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## Nonprofit CEOs' Learned Skills and Strategies for Leadership

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# Walden University

College of Education and Human Sciences

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Julie Gallanty

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2023

Abstract

Nonprofit CEOs' Learned Skills and Strategies for Leadership

by

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MA, Adelphi University

BA, Binghamton University

Project Study Submitted in Partial Fulfillment

of the Requirements for the Degree of

Doctor of Education

Walden University

June 2023

## Abstract

Nonprofit organization Chief Executive Officers (CEOs) bring their unique experiences to their executive positions but are often unprepared for new responsibilities and challenges, which require a broad skill set. The problem identified was the gap in professional development in unexpected and acute areas. This study aimed to explore the on-the-job learning of nonprofit CEOs and the professional development training needed to support them in their position. Kolb's experiential learning framework was used to develop the study that examined the strategies used to gain the knowledge needed to perform effectively in their CEO roles. The research questions focused on understanding how CEOs currently learn skills needed for their position and what tools and resources would be useful for improving their effectiveness. A basic qualitative research design was used to collect data through a two stage process. First, a survey was emailed to 146 CEOs, with 12 responding. The second step was conducting semistructured interviews online with 5 CEOs to further explore the survey responses. The responses from both groups were analyzed using codes and themes and synthesized to compare and contrast the data. The analysis showed that CEOs learn best from peer groups and need added training and resources in crisis management and communication, fiscal education, and board development. A three day professional development training was developed to address CEO professional knowledge gaps. Implications of positive social change may occur with increased CEO competencies that enhance their understanding of the strategies and newly acquired knowledge that increase their effectiveness for successfully leading nonprofit organizations.

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## Dedication

This is dedicated to my three daughters, who have been unwavering in their support and encouragement.

## Acknowledgment

I want to thank and acknowledge my chair, Sydney Parent, Ph.D and second member Carole Pearce, D.Ed. for their support and encouragement.

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## Section 1: The Problem

### **The Local Problem**

Experienced chief executive officers (CEOs) of nonprofit organizations are executive leaders who simultaneously lead and manage relationships with boards of directors of organization operations, meet the needs of the local community the nonprofit organization should serve, maintain fiscal stability, and adhere to legal and government compliance requirements (Carmeli et al., 2012). The successful sustainability of a nonprofit organization relies on the capacity of the nonprofit CEO to balance multiple competencies, skills, and capabilities (Parry & Sinha, 2005). The overarching expectation of the nonprofit CEO is to authentically utilize the internal and external stakeholders to advance the organization's mission (Gilstrap et al., 2015).

The frequently changing, complex skills required by a nonprofit CEO can be daunting and challenging. Nonprofit CEOs lead an organization through continuous change and improvements in response to societal challenges and community needs (Goh & Richards, 1997). The nonprofit CEO is expected to adapt and manage change in ways that most effectively lead the nonprofit organization (Sparr et al., 2017). Effectively responding to change requires a willingness to engage in ongoing formal and informal learning by the nonprofit CEO (Stewart, 2016). One challenge for the nonprofit CEO is to identify their learning needs and then determine strategies by which they can meet those needs without creating the appearance of questionable competence (Dym et al., 2011).

The gap in practice within the nonprofit organization sector is that most executive leadership development programs are ineffective and expensive, focusing little on the

social, interpersonal, and strategic aspects of leadership necessary for the position (Volz-Peacock et al., 2016). The lack of knowledge is also reflected as an immense challenge in the local nonprofit organization that provided the site of this study. Three nonprofit CEOs in Green Organizations (R.C., personal communication; H.S. July 23, 2015, personal communication, and W.R., personal communication, April 18, 2016) supported the assertion that there is a lack of adequate executive leadership training for their positions. Action learning is a cost-effective way to address the organization's ongoing professional development needs. Action learning involves small groups working together while learning individually and as a team (Volz-Peacock et al., 2016). Nonprofit CEOs need to collaborate with individuals and lead groups, such as boards of directors or staff, to run the nonprofit organization; learning must occur individually and with the various groups with whom the CEO interacts.

Action learning requires collaboration from all stakeholders in an organization. Organizations are facing the same challenges worldwide. Organizations must increase the capabilities of their leaders with less time and fewer financial resources. Organizations must develop their leaders in order to complete concrete goals and objectives (Volz-Peacock et al., 2016). A recent article in Forbes Magazine posits that successful CEOs recognize that learning and personal development are essential for professional growth. Skibola (2011) documented CEO support of ongoing education, highlighted by the perspective of Garry Ridge, CEO of WD-40, who supports the importance of fostering organizational culture through continuous learning and shared his need for continued skill development.

The reluctance of some nonprofit CEOs to disclose deficiencies in their learning needs impacts their leadership and organizational strength (Tebbe et al., 2017). First, the nonprofit CEO comes into the position as the presumed expert and is, thus, expected to have all the required skills upon hire (Walsh et al., 2014a). Second, the work in nonprofit organizations fluctuates due to changing circumstances within the local environment requiring change agent leadership (Landles-Cobb et al., 2014) and organization culture and performance (Pinho et al., 2014).

CEOs come to the position with previous experiences, shaping their perspective and leadership approach (Merriam & Bierema, 2013). In the constructivist view, adult learning occurs when self-organization and the end product of the activity result in learning (Fosnot, 2013). Given the independence expected of the nonprofit CEO, the independent meaning-making is grounded in prior experience that characterizes constructivist learning and offers a practical framework to explore both the learning needs of nonprofit CEOs and how these learning needs are met.

Green Organization is the pseudonym for the nonprofit organization in the Northeastern United States that provided the site for this study and reflects the national trend of rising expectations of the CEOs within the Green Organization. The CEOs reported feeling pressured by their board of directors to acquire expertise in new areas without continuous training, support, and professional development programs (R.C., personal communication; July 23, 2015). Green Organization is a national nonprofit organization with local chapters throughout the United States. Green Organization's regional branches are independently operated by a board of directors who have a

fiduciary responsibility to the organization and hire and fire the CEO. There are 178 locations in the Northeast United States. Each location has a CEO in charge.

CEOs interviewed during the problem identification research that provided the foundation of this study reported a “lack of support and training that addressed learning from their skill set needed to do their job” (H.S., personal communication, May 18, 2018). CEOs felt isolated and expressed concern about sharing their learning needs with peers or board members. Both sources shared that CEOs are expected to have broad expertise. With the absence of a professional development program for this population and the concerns expressed by two CEOs within the organization, there was a need to investigate these challenges.

In Walsh et al.'s (2014b) interview, researchers found a sense of isolation among nonprofit CEOs, primarily when the bond between the CEO and board chair was unstable. Walsh et al. interviewed 200 CEOs and found they were uncomfortable asking for help because they appeared weak. Many CEOs expressed concerns regarding disclosing their skill or knowledge gaps to their board, further enhancing this sense of isolation, and limiting their effectiveness. Constructivism is about building on skills that the learner previously gained. School principals using a constructivist approach found that it helped them to problem-solve complex situations (Shapira-Lishchinsky, 2015). Norris-Tirrell et al.'s (2018) research found that executive learning increased under a constructivist perspective, resulting in better job performance and career promotions, specifically how individuals learn based on their prior experiences and how they interpret new ones. Fosnot (2013) defined constructivism according to four principles. The most

important principle is that learning depends on what one already knows (Amineh & Asl, 2015).

For example, Merriam and Bierema's (2013) research on adult learning revealed that constructivist learning is not linear. Each nonprofit CEO uses their unique experiences to assemble a structure that makes sense for their operation (Merriam & Bierema, 2013). One nonprofit CEO at Green Organization also confirmed the need for opportunities to personalize learning based on the context of the nonprofit organization (W.R., personal communication, April 18, 2016). They effectively navigate the complexities of leading and managing an organization while not disclosing gaps in leadership and job-related skills that were uncomfortable for the nonprofit CEO (Delbecq et al., 2013). When nonprofit CEO R.C. discussed her role in the Green Organization, she described being uncomfortable sharing her professional weaknesses and knowledge gaps (R.C., personal communication, August 13, 2015). Many nonprofit CEOs are reticent to share gaps in their skills and ability to lead the organization (Tebbe et al., 2017). Therefore, professional development is needed for this executive-level and continuous learning.

A recent example of the need for ongoing learning is the increase of social media, such as Facebook and Instagram, to promote the organization. Staying relevant and understanding the changing landscape of nonprofit organization survival is essential to the continued employment of nonprofit CEOs and the organization's success. O'Reilly et al. (2014) found that the intersection of the CEO's personality and the organization's culture has implications for the outcomes of the nonprofit organization. As it is the CEO's

responsibility to enact the vision set by the board, aligning the CEO's personality, background, and skills with the organization identified needs and areas crucial to success. Each CEO comes to the position with a broad set of skills needed to be successful. However, each Green Organization has specific needs; the organization wants CEOs with expertise and experience. Once in the position, CEOs take a nonlinear approach, interacting with the environment to learn through their surroundings to understand what steps need to be considered (Fosnot, 2013). Social media reaches sufficient people outside the organization. They could easily communicate the mission and vision of the organization to stakeholders and potential partners. The board and CEO must agree on using social media to effectively improve organizational culture and communication.

Integrating social media may be determined by the comfortability of board members and staff who approve of this communication medium. The comfort level of social media may differ between board members and leadership. For instance, Green Organizations are in various communities with varied socioeconomic statuses. Social media and penetration rate (how many households access it) may vary by geography and income. Developing a plan based on the full range of parameters is complex and nonlinear. Further, nonprofit CEOs may need to be trained in both the technical and strategic aspects of social media and may have preferences for undertaking that learning. For nonprofit CEOs to stay current on industry trends and legislation, continuous learning is vital, which may influence the nonprofit organization's success.

Nonprofit CEOs undertake significant and complex responsibilities that require ongoing learning. The problem is that nonprofit CEOs indicate a sense of isolation and

frustration with a lack of support for their continuing learning needs, paired with a fear of exposing those needs in a way that creates doubt about their competence. The result is limited success for the nonprofit CEOs and the organizations they serve. I developed this study to identify the support and training needs of nonprofit CEOs.

## **Rationale**

### **Evidence of Problem at the Local Level**

Green Organization's CEO position is complex, requiring many skills, strategies, and knowledge. The CEO is the face of the organization. As adult learners, the nonprofit CEOs' continuous situational and experiential learning as they perform their jobs changes daily. Locally, two CEOs (R.C. & H.S. personal communication, September 2015) expressed a need for additional tools and resources to provide leadership to the Green Organization effectively. Both R.C. and H.S. said a lack of practical tools and strategies for the soft skills to support them in the CEO role. The CEO's concern reflects the warning issued by Lee (2019), who noted that a positive relationship between an organization's board of directors and CEO is crucial and requires a collective understanding of the organization's needs and how the CEO can meet them. The board of directors' members are policy volunteers with the fiduciary responsibility to oversee the non-profit organization, ensure it adheres to the by-laws for each state, and comply with all applicable laws.

The board of directors sets policies for the organization and hires and fires the CEO. The board of directors plays a role in developing the CEO and the organization (Walsh & Landles-Cobb, 2014). The leader and the board impact the organization's

relationship, communication, and governance (Clark et al., 2014). It also can limit what the CEO shares with the board of directors since their job performance and critical outcome objectives, such as making the budget, can affect their confidence and trust in the executive leadership to do the job. The CEO and the board of directors need to work collaboratively for the organization to grow and prosper. However, many CEOs are reluctant to reveal a weakness to a board member (Cornforth & MacMillan, 2016). CEOs reported that conflicts with the board were among the top reasons they left the position (Landles-Cobb et al., 2014).

Bish and Becker (2016) expanded the leadership capacities of CEOs into task and relationship-oriented behaviors. This delineation clarifies the two actions that CEOs balance with the board of directors to collectively achieve the agreed-upon goals for the organization. Bish and Becker and Yukl (2012) found that the relationship with the board of directors was essential to the CEO's position and success. Each CEO also enters the organization with their unique blend of these behaviors, such as critical thinking, leadership, and fiscal management, and may see that they need skill-building in one or more areas to meet best the requirements outlined by the board. The ability of the board to identify those needs and then provide resources by which the nonprofit CEO can meet them may determine the organization's success.

Frequently, nonprofit organizations contend with operational cash flow issues in economically stable periods and turbulent ones (Wolf, 2022). To prosper and survive in this rapidly changing environment, nonprofit organizations and their CEOs must adapt and align with their local settings and continue to manage the funding and operations.

The primary role and responsibility of the CEO is to oversee and lead the organizational processes (staffing and programs) according to the goals and objectives mutually agreed upon by the board of directors and CEO (O'Reilly et al., 2014).

Balancing the internal and external factors that impact operational and fiscal operations is essential. The uncertainty of government funding, changes in community demographics and participant profiles, and program competition (such as a preschool, youth sports, or fitness center) require an ongoing focus on the variable financial health of the organization. The operational health and capacity of the organization for sustainability have become increasingly important factors in measuring the success of the CEO (Carter & Greer, 2013). Carter and Greer's (2013) research found that the CEO's strategic leadership and planning role has become a crucial component in measuring organizational success.

The CEO is the face of the organization in the community. They are the spokespeople for communicating the organization's vision to the community's various stakeholders. Key people in the Green Organization include members, participants, community leaders, donors, and those served by the organization (Carmeli et al., 2012). The skills needed to navigate these ongoing, varied relationships within the community are essential to the CEO's credibility and the organization's success (Gilstrap et al., 2015).

Self-awareness is key to learning in the role of nonprofit CEO. Nonprofit CEOs must gain and maintain the community's and other stakeholders' trust. Achieving and sustaining trust within the community takes time. It includes building relationships and developing partnerships with essential leadership.

Semistructured interviews helped to explain how CEOs uncover and remediate the gaps in their knowledge base to effectively lead and manage their nonprofit organizations (Sherlock & Nathan, 2007). The responses from the nonprofit CEOs participating in the study may shed light on the possible learning experiences of this elite group. The results may suggest developing specific or professional development training (PDT) that would support the expansion of the best learning strategies. A CEO shared frustration in navigating their gaps in knowledge and skills without weakening their position (I.B., personal communication, September 25, 2015). Two other nonprofit CEOs noted that there was no professional development offered to them during their early days in the role that included content that addressed the on-the-job skills they needed to fulfill their daily responsibilities (R.C., personal communication, August 13, 2015, and W.R., personal communication July 22, 2015).

Bish and Becker (2016) stated that balancing the knowledge and skills necessary for nonprofit leadership positions is often responsible for high stress and isolation. LeRoux and Langer (2016) found that boards fail to support the nonprofit CEO. The pressure of nonprofit organization operations, ongoing adult learning, and required professional development is continuous. Continuous on-the-job learning of the CEO is expected and necessary (O'Reilly et al., 2014). It is essential for the CEO to balance the complex relationships with board members and to change nonprofit organizational fluctuating demands for sustained success (Stewart & Diebold, 2017). Billett and Choy (2013) found that workplace adult learning is needed, subject to redefinitions related to changing expectations internally and externally.

A longitudinal study by Reid and Turbide (2012) found that the importance of the relationship between the CEO and the board is critical in crises. How leaders handle stress under tough circumstances and their interaction with the board resulted in different outcomes based on the level of trust between the two parties. The focus was on the relationship between the two, not the lack of knowledge of the CEO in the crucial performance area.

The complexity of the board of directors and the CEO's ongoing board relationships is essential to survival in the position and determines organizational culture. The CEO's long-term connection with the board directly correlates to the board directors' backing. The board support of the CEO provides a framework of collaboration and cohesiveness to the organizational culture. Hopkins et al. (2014) reported CEOs' experiences "addressing multiple personalities and hidden agendas" (p. 420). The learning in these groups is usually trial and error in adult education experiences. Hopkins et al. found that the CEO's knowledge focuses on achieving the desired outcomes while avoiding excessive vulnerabilities (Sherlock & Nathan, 2008).

Nonprofit CEOs have few resources or best practices to fill their learning gaps (Stewart & Diebold, 2017). Adult learning is essential to the ongoing success and survival of the organization. The nonprofit CEO's ability to gain new skills can improve their leadership capabilities, so they need to identify strategies to enhance these capabilities. According to Volz-Peacock et al. (2016), action learning allows an organization to create breakthrough strategies to develop necessary leadership skills

within settings like nonprofit organizations. Ongoing professional development helps nonprofit CEOs acquire new skills and positively influence organizational culture.

The Green Organization's national office provides one-week training for new CEOs to learn the best practices for leading and managing a nonprofit organization and working with a board of directors. The material covered during the five days training is board development, finances, fiduciary, risk management, and human resources. Some materials provide resources for tools that may be needed but do not address or discuss how latent learning occurs in unfamiliar areas (Green Organization, 2019 website). Billett and Choy (2013) observed that leadership was stronger where participatory workplace practices construct the critical knowledge required for daily responsibilities and organization expectations. Norris-Tirrell et al. (2018) found that career path experiences in the sector or workplace learning influenced CEO leadership.

### **Evidence of Problem from the Professional Literature**

The purpose of the study was to understand learning strategies used by nonprofit CEOs on the job and finding tools and training to address the gaps nonprofit CEOs identify to support them in their position. At the broader level, nearly half (46%) of nonprofit CEOs responding to a Bridgespan Group non-profit survey reported getting little or no help from their boards when the nonprofit CEO began their tenure (Walsh et al., 2014b). Billett and Choy (2013) stated that workplace-learning experiences are increasingly crucial in responding to the growing demands and expectations when understanding how people learn. Serrat (2017) posited that many organizations attempt quick and uncomplicated fixes to create organizational change. However, organizational

learning drives organizational change. According to Serrat, organizational learning is "neither possible nor sustainable without understanding what drives it" (p. 3). Ongoing or continuous organizational learning is necessary because, as Billett and Choy stated, experiential learning will increasingly help nonprofit CEOs respond to the growing demands and expectations in their position.

Sargeant and Day (2018) studied nonprofit organization leadership in the United States, identifying specific leadership challenges that nonprofit organizations face in the 21<sup>st</sup> century. Among these, Baby Boomers are reaching retirement age and leaving the profession, creating a significant leadership transition. Millennials ascend into leadership positions, lack practical on-the-job experience, and need more professional development (Sargeant & Day, 2018). Dula et al. (2020) revealed a need to overcome the generational gap and perceptions of Millennials as self-absorbed and ineffective leaders. Anderson and Sun (2017) concurred with other studies on organizational leadership about how employed personalities, work attitudes, values, and leadership skills were related to organizational culture and success. Another concern is the growth of private charities and nonprofit organizations. The growth of these charities and nonprofit organizations has created a need for more leaders with the skills to run their respective organizations effectively. According to Sargeant and Day, "To successfully compete for the talent, we need to think now about the needs of future leaders" (p. 19). Sargeant and Day advised nonprofit organizations to increase opportunities for mentoring, professional development activities, and growth opportunities. Sargeant and Day's study is consistent with research conducted by Perry Jones (2022), which stated that there is an intersection

between the nonprofit CEO's personality, organizational culture, and outcomes for the nonprofit organization.

Freeborough (2020) studied the effect of transformational leadership on nonprofit organization leader engagement. Boykins (2019) attested that nonprofit organizations, which recruit and keep influential leaders, are more likely to sustain long-term effectiveness and endure economic downturns. The result was that a relationship exists between effective leadership and employee engagement. According to Freeborough and Patterson (2016), "Employee engagement is related to high performance, and employees who are highly engaged have a positive emotional attachment to work" (p. 51). Green Organization's challenges with providing a healthy workplace-learning environment were expressed earlier in this dissertation. Increasing employee engagement may contribute to transformative leadership. Transformative leaders have the tools necessary to provide a positive learning and working environment for their employees in the nonprofit organization. Effective leadership requires buy-in from the board of directors and other stakeholders. The nonprofit CEO's relationship with the board is most important because the board of directors evaluates the nonprofit CEO's performance.

Hideto Dato et al. (2020) studied the relationship between board chairs and nonprofit CEOs. Further, they argued that, too often, nonprofit organization board members assume CEOs do not pursue their interests and act in ways aligned with the organizational mission. This observation aligns with Gilstrap et al.'s (2015) recommendation that ongoing education is necessary for effective leadership. Buse et al. (2016) noted, "We encourage nonprofit organizations to employ state-of-the-art field

education and to train and improve organizational effectiveness” (p. 493). The studies mentioned above support the need for ongoing learning for CEOs in Green Organizations. Opportunities for professional growth can improve organizational culture and effectiveness (Kumar & Bhandarker, 2020). The experiential learning theory posits that learning is a continuous process grounded in experience (Kolb, 2014). Practical or experiential learning could benefit the CEO of the nonprofit organization because understanding organizational culture and effective leadership may contribute to organizational success.

### **Definition of Terms**

*Chief executive officer (CEO):* The board of directors hires a CEO to run the operations (programs and finance) and regularly reports progress to the board of directors. The CEO serves as the organization's executive leader and, with the board of directors, aims to achieve the nonprofit organization's strategic direction and goals. The desired competencies of a nonprofit CEO include fundraising, change management, nonprofit organization sector expertise, leadership, and an academic degree (Moldoveanu & Narayandas, 2019).

*Policy volunteer/board member:* An individual who serves on the board of directors of a non-profit organization. They set the mission and vision of the organization in collaboration with the CEO. Garry (2020) stated that a policy volunteer/board member's duty and responsibility is to ensure the organization is aligned with the mission and maintains compliance with bylaws, state requirements, and collective fiduciary rules

for the nonprofit organization (assets and operations). They need yearly regulatory compliance for Green Organization to remain a nonprofit organization.

*Action learning:* Learning occurs when small groups within an organization work together, benefiting both individuals and groups (Kayes & Kayes, 2021). Much of the work in nonprofit organizations aligns with small groups where learning happens collectively and with each participant. Constructivism is how individuals construct their understanding of their sphere and apply meaning to gain further knowledge (Fosnot, 2013). The CEO's use of constructivism is shown by their on-the-job learning, which includes acquiring experience that creates meaning to increase understanding (Gagnon & Collay, 2005).

*Nonprofit organization:* Nonprofit organization is defined as a corporation with a charitable mission supporting a cause and not paying taxes on revenue (Tavanti & Tait, 2021). Also called a 501c3, this IRS designation allows people to take deductions for donations made to the organization (Williams & Doan, 2021).

### **Significance of the Study**

Over the past 20 years, there has been a tremendous amount of research on organizational development, adult learning, experiential learning, and leadership. The contribution to these areas in the literature is well-studied and extensive. There have been studies on nonprofit CEOs, nonprofit organization leadership, and board relationships (LeRoux & Langer, 2016; Mason & Kim, 2020; Stewart & Diebold, 2017). However, prior research does not reflect a study on how top-level elite CEOs learn the skills necessary to perform their jobs. Much of the research on nonprofit organization

leadership has focused on the motivation and leadership style, as well as the relationship between the nonprofit CEO and the Board (Carter & Greer, 2013; Golensky & Hager, 2020; McAuley, 2019), but actual skill and knowledge building have not been examined. This research explored the adult learning needs of nonprofit organization CEOs, specifically, how they learn (formally and informally) in the continuously changing internal and external environments, which affects how they lead, influences the success of the organization that affects how they lead, which, in turn, influences the organization's success.

Ongoing learning fosters cooperation and collaboration among employees and managers. Senge (1992) outlined the difference between organizational and individual learning, stating, "Organizations learn only through individuals who learn. Individual learning does not guarantee organizational learning. Without it, no organizational learning occurs" (p. 34). Senge (1992) expanded his research on learning organizations. He discovered a correlation between continuous learning and developing a shared vision for the organization. Lee et al. (2018) agreed that successful organizations are learning organizations that empower people to work toward a shared vision. A CEO with a strong relationship with employees, stakeholders, and the board of directors will be more effective in their leadership position. The CEO expects to continue gaining skills to be competitive and keep up with current trends.

When a CEO accepts a position, they are expected to have a broad skill set, pre-determined by the board of directors that hires them, to succeed. Walsh and Landles-Cobb (2014) found repeated CEOs' experiences that reflected the executive leader's

hands-off board supervision. Bryan (2019) explored the balance of leadership learning and organizational performance. Their study did not include the individual leadership learning strategies used by management. The study's results revealed a need to recognize the impact of professional development on organizational culture. Rowland and Hall (2014) identified a need to study how individual and organizational learning could enhance organizational performance. The purpose of the study was to understand learning strategies used by nonprofit CEOs on the job and finding tools and training to address the gaps they identify to support them in their position.

The nonprofit CEOs' first three years are often the most challenging, as most learning occurs during this time. Several studies supported the premise that the strategies used by nonprofit CEOs during this time would reduce stress and likely increase retention in this role (Hou et al., 2013; Mathews, 2019; Walsh et al., 2014a). Nonprofit CEOs start the position and must understand the daily challenges and long-term concerns, with little or no organization or history provided. De Clerck et al. (2021) found that numerous boards underperformed when onboarding a new nonprofit CEO and did not sustain ongoing supervision and support. Also, many nonprofit CEOs were uneasy about sharing their gaps in content or management leadership (Eckhart-Queenan et al., 2019). Given these known issues related to the learning needs of nonprofit CEOs, this examination of the Green Organization provides valuable insights into addressing this ongoing challenge in the nonprofit organization world.

## **Research Questions**

Nonprofit CEOs are expected to have broad knowledge and skills to lead and manage situations and issues that arise. Sometimes the nonprofit CEO does not have the skills or expertise and must learn them. In this elite position, lacking knowledge may make them appear vulnerable. Understanding what tools and strategies are used to gain this knowledge was the gap in practice. The purpose of the study was to understand learning strategies used by nonprofit CEOs on the job and finding tools and training to address the gaps they identify to support them in their position. The research questions were:

1. How do nonprofit CEOs in Green Organization describe their job learning experience as nonprofit CEOs?
2. What professional development opportunities do nonprofit CEOs consider most important in helping them meet job expectations?
3. What tools and resources would the nonprofit CEO suggest supporting their learning?

## **Review of the Literature**

### **Database Search Strategies**

The database search strategies used for collecting the literature review were Google Scholar, ProQuest Central, ABI/Inform, Ulrich Periodical Directory, SAGE Premier, and Taylor and Francis Online. The search words used on these databases were CEOs, nonprofit CEOs gap in learning, CEO experiential learning, learning in a nonprofit organization, CEO leadership, nonprofit CEO leader, and experiential learning.

Keywords and search strings used were adult learning and the CEO, CEO and board relationships, CEO organizational performance and adult learning, nonprofit organizational capacity, nonprofit CEO leadership, and executive leadership and adult learning. Research and articles published in the Harvard Business Review, Stanford Innovation Review, and BoardSource were also accessed.

Executive leadership and adult learning are interrelated. A CEO must have the skills, communication, and guidance to succeed. However, with the changing of internal and external stakeholders, the nonprofit CEO must be willing and capable of being a lifelong adult learner to address and respond to unexpected issues during their tenure. Although there is extensive research on leadership, leadership styles, nonprofit organization management, and adult learning in the workplace, there has been little research on the gaps in nonprofit CEO learning and strategies for them to learn what they do not know to do their job.

The role of the nonprofit CEO is a complex leadership role, requiring an ability to interact with, inspire, and engage various stakeholders. Added to this responsibility is the annual expectation of the organization's financial stability. Each of these roles relies on developing a relationship of trust. Each of these abilities requires a unique knowledge and skill base, thus, requiring the nonprofit CEO to encompass a broad range of expertise. They must learn some of the jobs through formal or informal ongoing learning. The literature review explores the current research on nonprofit organization leadership, the skills required for effective nonprofit organization administration, and the gaps identified

within the field associated with nonprofit organization leaders' ongoing training and professional development.

### **Conceptual Framework**

Constructivism is based on multiple theories, all of which involve active learning. Lim et al. (2021) defined constructivism as a process with both an active and a personal element. This research study explored how experiential learning is essential for improving the leadership of CEOs in nonprofit organizations and maintaining organizational culture. LeRoux and Langer (2016) found in their research on learning, performance, and reward that professionals related to the nonprofit CEO's relationship with the board impact organizational performance. The constructivist framework was essential because it supported previous research on how continuous and experiential learning can influence leadership and organizational culture. It also provides a nonprofit organization accountability framework (Tacon et al., 2017).

The conceptual framework used for this study was the lens of experiential learning developed by Kolb and Kolb (2005) and informed by constructivist learning theory. The four stages are: (a) concrete experience, (b) reflective observation, (c) abstract conceptualization, and (d) active experimentation. Through the adult learning model of concrete experience, reflecting the experience and conceptualization, experimentation should yield increased learning for the nonprofit CEO in acquiring a new understanding. Kolb and Kolb noted that learning "is the process whereby knowledge was created through the transformation of experience" (p. 38). Learners using this model

move through each of the four stages of the experiential cycle. Each part of the cycle has its characteristics and processes linked to the other parts (Merriam & Bierema, 2013).

The first cycle in Kolb's experiential learning cycle is concrete experiential. Knowles et al. (2014) described the cognitive learning system as the first stage in Kolb's experiential learning cycle. A person, such as a nonprofit CEO, could recall an experience or doing something that causes them to observe it. They described this cycle as the feeling stage. It starts with the identification of the concrete experience of the adult learner.

The second stage is reflective observation (RO), which is where the nonprofit CEO reflects on the concrete experience either by self-reflection (journals) or externally (talking with peers, for example). Once the adult has identified the concrete experience, this cycle provides the opportunity to see or gather additional information to understand and learn more about the concrete experience. This cycle is described as the watching or observing stage (Merriam, 1998).

Abstract conceptualization allows the nonprofit CEO to consider the experience (Schonour, 2019). The thinking cycle is essential since it links the concrete experience with the reflective observation to move to the next cycle of abstract conceptualization (Merriam, 1998). After moving through the first two cycles, this segment allows the person to think through the first two cycles to understand the learning through experience impact.

The final stage, active experimentation (AE), is experiential learning. It summarizes the learning that occurs through the first three cycles to plan, experiment, or

test what has been learned. It is the culmination of the experiential learning process for the nonprofit CEO as they move through each of the four stages.

The experiential learning theory developed by Kolb and Kolb (2005) was an excellent match to help understand the adult learning that occurs in nonprofit CEOs in their natural work environment. Kolb's theory of cognitive learning systems explores the two dimensions of adult learning: concrete vs. abstract learning experiences and active experimentation vs. reflective observation. It aligns with the on-the-job experience of the Green Organization nonprofit CEO W.R. (personal communication, April 28, 2016). The four stages are doing, reflecting on the experience, learning from the review, and trying what was learned. This framework was adult learning and helped answer the research questions in this study.

## **Review of the Broader Problem**

### ***Adult Learning and the CEO***

Yee et al. (2019) explored nonprofit CEO openness and culture through a survey about performance outcomes. Prior research was conducted on many facets of the nonprofit CEO regarding best practices relative to their role as organization leaders. Yee et al. found a modest link between nonprofit CEO openness and positive performance results among hi-tech companies.

Similarly, a case study by Taddy-Sandino et al. (2019) considered performance outcomes in nonprofit organization capacities. Their findings supported a correlation between the importance of personal knowledge and strategic thinking and alignment with the values of the organizational mission. In another project, nonprofit CEOs were

reluctant to participate in research on values, styles, and organizational performance, presumably because they felt vulnerable (Carter & Greer, 2013). The adult learning of executives in these studies did not focus on potential knowledge gaps. Their research question was about the impact of adult learning through the lens of performance outcomes and influence on the organization.

Much of the nonprofit CEO and adult learning literature focused on identified traits or job functions, such as strategic planning, board interaction, management, operational efficiency, and fiscal management (Coupet & Berrett, 2019). Peng et al. (2016) examined the influence of the nonprofit CEO on the meaningfulness of employee work, and Allen et al. (2018) noted the importance of authentic leadership communication. Neither of their studies mentions the gap in nonprofit CEO skills in these areas. Peng et al. and Gilstrap et al. (2015) focused on gained skills. The previous studies did not mention the need for ongoing adult learning.

### ***CEOs' Organizational Performance and Adult Learning***

Zhai et al. (2017) and Searing (2018) examined organizational performance, vulnerability, and nonprofit CEO relationship leadership to quantify the best decisions and organizational performance. Both found a correlation between disconnected boards and fiscal strain in the organization, which impedes success. They examined organizational failures and the role of nonprofit CEO learning with a recommendation for further research into building trust with the nonprofit CEO and other senior leaders. Liket and Maas (2015) studied organizational learning and performance using a financial model (sustainable), and others used leadership behaviors as a measure of organizational

performance and learning (Despard, 2017). This research yielded insight into their review topic but needed to include a discussion on the gaps in nonprofit CEO learning. Instead, the focus was on teams' learning climate and leadership behavior.

The relationship between the nonprofit CEO and the board can influence organizational performance. Willems (2016) confirmed that organizational effectiveness was the dominant factor between the two roles. Mathews (2019) and Reid and Turbide (2012) supported the findings of Willems and expanded to include developing trusting relations as a powerful dynamic. Senge (1992) stated, "Organizations learn only through individuals who learn. Individualized learning does not guarantee organizational learning. However, without it, no organizational learning occurs" (p. 139).

The on-the-job learning of the nonprofit CEO has numerous forms. Jiang et al. (2016) reported that over 75% is informal learning on the job. A crisis presents challenges for a leader. An emergency is often unexpected and requires the agility of the leader to gather and synthesize the information to address and respond to the crisis. The transformational leader study found that collective learning during a crisis or failure strengthens the organization (Ahmed, 2005; Global, 2020). Mitchell (2018) sometimes found that outside pressures during an emergency may impede intelligent decisions. In a study by managers, Becker and Bish (2017) found that the executive leader's knowledge and experience influenced the organization's capacity.

### ***Informal and On-The-Job Learning***

There is limited research on nonprofit CEOs' informal learning or adult education in nonprofit organizations. Findings by Bryan (2017) support strengthening

organizational performance and nonprofit CEO learning that results in the organization achieving its goals. Leaders are always learning on the job, both from their mistakes and their achievements (Allio, 2016; Senge, 1992; Shupe, 2020). There is extensive literature on workplace and informal learning for adult learners (not specifically in a nonprofit CEO position). Workplace and informal learning have changed over time (Norris-Tirrell et al., 2018). Professional development is not limited to formal classroom instruction (Manuti et al., 2015).

Numerous factors can affect the nonprofit CEO and learning. The literature on executive learning reflects studies about how adults in nonprofit CEO positions adapt to the workplace environment and notes that their ability to adjust was related to their success with on-the-job learning (Becker & Bish, 2017; Saidu 2019). Job demands and stress associated with leadership have been found to influence decision-making (Hongkai, 1992).

Stead and Elliott (2013) found that experiential learning is used more frequently in a formal work setting, but more research is necessary to measure informal impact and benefit. Kolb (2014) has conducted extensive research in experiential learning that developed the four cycles of the process. Since his work in 1984, Kolb (2014) conducted additional research on this topic with a focus on the four cycles of concrete experiences, abstract conceptualization, reflective observation, and active experimentation.

Organizational effectiveness and best practices are interrelated and tie into experiential learning (Berlan, 2018). Liket and Maas (2015) analyzed modalities, developing a gauge to provide insight into their effectiveness. A gauge requires reflection

and comparison of organizational outcomes. This instrument offers the best practices but no supportive information on strategies to learn the items yet to be internalized by the nonprofit CEO.

Studies on transformational leadership and job learning supported understanding regarding top executive descriptors. Zhang et al.'s (2015) research on nonprofit CEOs uncovered a weaker significance in female nonprofit CEOs than in males when collective learning is not as cohesive as organizational leadership. Both groups had the same results when the education was aligned with all levels (Stewart & Kuenzi, 2018).

Schürmann and Beusaert (2016) explored informal learning through frames that clarify the structure of the knowledge. This study examined all employees and did not separate the executive leadership. However, the results indicated no significance in the organization's size (family-owned to the large corporation) but in an individual determination of perceived necessary informal learning. Additional studies by Manuti et al. (2015), Billett and Choy (2013), and Boud and Molloy (2013) studied informal learning in the workplace with a focus on the entire workforce. However, they did not group the participants specifically by job position. More research is necessary to determine how informal learning directly affects nonprofit CEOs.

In summary, there is a gap in the research on how nonprofit CEOs informally learn how to decide (Marques, 2017) and do aspects of their job that they currently need to learn how to do it. The nonprofit CEO regularly faces new challenges and content expertise, so specific research in this sub-area would benefit the nonprofit CEO and the organization they lead. Understanding the professional development needs identified by

nonprofit CEOs to support strong job performance would be a start. The success of the organization's continued viability depends upon the executive's leadership acumen and their capacity to acquire new skills for the nonprofit CEO to lead the organization effectively.

### *Nonprofit Organization Capacity*

The influence of nonprofit CEOs on the function of nonprofit organizations has been researched using the lens of management and organizational capacity.

Organizational capacity determines what the nonprofit organization can do and differs by size and staff (Becker & Bish, 2017). The ability of the nonprofit CEO to do the work of the organization depends on several key areas, including fit in role (Li, 2019), relations with staff, board, and community (Cornforth & MacMillan, 2016; Zhang et al., 2015); skilled top management (Clark et al., 2014; Delbecq et al., 2013); and strategic planning (Bish & Becker, 2016; Bryson, 2018). Several research studies support the complexity of nonprofit organization executive leadership. The knowledge and experience of the executive leader were needed to build effective leadership and influence organizational culture (Walsh et al., 2014a). The organization's culture sets the tone for the nonprofit organization (LeRoux & Langer, 2016; Mukund, 2016; O'Reilly et al., 2014).

Many studies looked at leadership styles, such as values and organizational culture. Liket and Maas (2015) studied organizational capacity through best practices. All this research examined visible variables such as the board and CEO relationship (Cornforth & MacMillan, 2016), the fiscal health of the nonprofit organization (Clark et al., 2014; Zietlow et al., 2018), and leadership staff within the organization (Peng et al.,

2016; Rosenbach, 2018). However, none explored the latent learning of the nonprofit CEO in organizational ability and education. Shumate et al. (2018) posited that organizational capacity is about an organization's potential to achieve its mission and objectives. The CEO aimed to promote the mission and vision of the organization. The CEO must have the tools to effectively lead the organization, encourage employee engagement, and influence stakeholders.

Stewart and Diebold (2017) found that the nonprofit organization's success is in its outcome and results. The objective of an organization is to meet its mission and objectives successfully. A nonprofit organization must have the attributes necessary to achieve its goals and objectives (Durham, 2018). Investment in ongoing learning and professional development will give leaders the tools needed to run the organization (Bryan, 2017).

There has been research conducted that links organization capacity and CEO effectiveness. Bish and Becker (2016) found a correlation between organizational capacity and nonprofit organization management. Personal knowledge of the leader strongly relates to the organization's success. Amar (2017) found that nonprofit CEOs are paid less than their for-profit counterparts and have less support, but the impact on the organization's results is similar. Ahmed (2017) identified the job's complexity and how the nonprofit CEO manages the intricacies and stress and correlated the tenure and success of the person in the position. The executive leader affects the organizational capacity and stability of the organization. Serrat (2017) posited that learning is the key to success in today's organizations. Bish and Becker (2016), Eschman et al. (2011), and

Serrat (2017) considered what factors contribute to helping organizations to remain relevant and thrive. The correlation between these studies is that knowledge is critical to every learning organization (Brown et al., 2016).

Effective leadership behavior is determined by how well the leader decides and builds relationships with team members, the board of directors, and stakeholders. The taxonomy of effective leadership behavior (Yukl, 2012) outlined four categories of behavior with a subsection in each area to detail them. The four areas were making decisions, influencing, building relationships, and seeking information (Yukl et al., 2002). Measuring organizational capacity and effectiveness is becoming increasingly important (Liket & Maas, 2015). CEOs were tasked with responding to the changing climate of compliance and internal and external stakeholders' issues and challenges. The CEO's effectiveness was related to their ability to maintain a relationship with the board, increase employee buy-in, communicate goals, mission, and vision, and influence organizational culture.

### ***CEO and Board Relationships***

The nonprofit CEO, the board chair, and the board of directors begin their relationship with the interview process; it is a pivotal relationship (Cornforth & MacMillan, 2016). Much research has been done on the relationship between these three roles within nonprofit organizations and corporations. Willems (2016) focused on the lens of a mental model, finding a strong correlation in nonprofit organization impact. A longitudinal study by Reid and Turbide (2012) discovered the relationship between board volunteers and the nonprofit CEO during a crisis. Cornforth and MacMillan (2016) and

Bruni-Bossio et al. (2016) supported the importance of the positive correlation between the nonprofit CEO and the board chair, which is a critical element in organizational governance.

Many methods have been used to understand the relationship between the board and the nonprofit CEO; none have explored the latent learning a nonprofit CEO does as part of their job. Sherlock and Nathan (2008) conducted a phenomenological study on nonprofit CEO learning experiences and found that the context of their local environment shapes their leadership. Additional research discovered that various boards had given little thought to developing the board and nonprofit CEO relationship (Walsh & Landles-Cobb, 2014). Some research has recorded comments by nonprofit CEO participants about their reluctance to share their lack of knowledge on a topic. LeRoux and Langer (2016) confirmed nonprofit CEO reticence to share gaps in their skill set, and several reported a disconnect with the board. Ihm and Shumate (2019) explored the factors that influence and impact board collaboration. They found a complex relationship between them.

Reid and Turbide (2012), Cornforth and MacMillan (2016), and Van Puyvelde et al. (2018) recommended that further research was needed to understand the relationship between the board president and nonprofit CEO since it is pivotal to the stability and sustainability of the nonprofit organization. None of the studies explored the gaps in knowledge or discussed any informal learning of the nonprofit CEO. The focus was on the relationship between the two roles.

### ***Executive Leadership and Adult Learning***

Although more research is needed, a growing body of literature explores transactional and transformational leadership. Anderson and Sun (2017) focused on the impact of leadership styles (transactional and transformational), resulting in a recommendation that further research was needed to compare with the complex contexts of organizations.

The umbrella of executive leadership includes the accountability of the nonprofit CEO and the organization and the job demands. Hamann and Foster's (2014) findings confirmed more stress and job requirements in the nonprofit organization compared to the for-profit sector. Coule (2015) explored the theoretical perspective of the nonprofit CEO and board relationship between individual and organizational accountability and governance. Many other researchers, including Popova-Nowak and Cseh (2015), studied organizational learning through the meta-paradigm perspective. Both studies found modest relationships between the two variables using this framework.

Zhang et al. (2015) found that evenly implemented transformational leadership had more substantial organizational performance outcomes. When inconsistent behavior was demonstrated, the results were weaker. These findings align with Becker and Bish (2017), who found that a lack of support influenced positive organizational outcomes. Again, this research focused on identifying traits to compare with the results. The recommendations do not address the gaps in transformational leadership (inconsistencies) – only the consequence within the organization. Clark et al.'s (2014) findings supported a

relationship between ownership, governance, and nonprofit CEO influence, yet did not focus on the strategies used regarding the informal learning of the organizational leader.

### **Implications**

Nonprofit CEOs lead and manage their organizations. This research study anticipated to provide training recommendations to support increased understanding and strategies for nonprofit CEOs to improve their leadership capabilities. The findings of this study may provide a framework to develop a support network and training for nonprofit CEOs hoping to increase organizational culture and leadership.

Research on nonprofit CEOs has been conducted in various areas of their leadership. It has focused on the influence of nonprofit CEO and board governance on performance (Clark et al., 2014), the CEO's personality, and the organization's culture and performance (O'Reilly et al., 2014). Both Reid and Turbide (2012) and LeRoux and Langer (2016) examined the pivotal relationship between the board of directors and the CEO. In the literature reviewed, the consistent gap in the research was learning strategies used by nonprofit CEOs when they need to learn a new skill.

Possible deliverables based on the findings from the project may be a professional workshop for nonprofit CEOs, a white paper on best practices to support nonprofit CEO learning, or a set of recommendations for nonprofit CEOs to use and assist them in their roles within an organization. The form the deliverable takes was determined based on the study's results and the needs they reveal.

## Summary

In Section 1, nonprofit CEOs of the Green Organization reported a lack of training to support their learning in unfamiliar areas of knowledge in their job. The study focused on understanding and exploring the training gaps identified by the nonprofit CEO participants. A review of the literature supports the complex tasks of a nonprofit CEO and the intertwining of leadership and adult learning necessary for success. Since they are the figurehead of the nonprofit organization, both internally and externally, most of them are resistant to ask for help when they encounter an issue not in their skill set (Allen et al., 2018). Nonprofit CEOs are the organization's leaders with multiple roles, reporting to a board of directors, supervising staff, and representing the organization in their community. The nonprofit CEO has an important and isolated position. As the organizational leader, the board of directors, staff, and community look up to them for leadership. When faced with a circumstance or crisis that needs to be addressed, they need to respond swiftly and appropriately. Numerous situations arise that are unfamiliar with what they have yet to experience.

Extensive research has been conducted on nonprofit organization leadership, as reflected in the literature review. It has studied adult learning and nonprofit CEOs, nonprofit organizational performance, nonprofit CEOs, and informal on-the-job training. In all instances, the research analyzed the strategies used by nonprofit CEOs to acquire new job-related knowledge. Learning new knowledge impacts the health of the organization's culture (Carmeli & Paulus, 2015), finances, and strength (Liket & Maas, 2015). It is a key element to the sustainability and success of the organization (Serrat,

2017). The literature review affirms that nonprofit CEOs were reluctant to request help for fear of appearing vulnerable (Carter & Greer, 2013).

Nonprofit CEOs perform a complex skilled job that requires soft skills to succeed. I selected a qualitative research design since it provided open-ended data collection. Surveys were emailed to 146 CEOs in the northeastern region of the United States. Five nonprofit CEOs randomly participated in in-person or Zoom Interviews (ZI) to triangulate the survey results and ask additional questions based on the responses from the emailed surveys.

The research project aimed to understand the learning strategies used by this elite group of executive leaders. The present study examined how nonprofit CEOs learn new skills on the job to lead the organization effectively. It examined learning strategies used and gaps self-identified by them. The significance of the study was to understand how on-the-job learning occurs in a nonprofit CEO and the analysis. Gaining a deeper understanding of what nonprofit CEOs currently use to support their learning could provide a more formalized approach to future occurrences. The interview questions were semistructured to allow participants to respond and provide examples of their experiences.

The study's findings may provide recommendations to support the creation of professional development plans for nonprofit CEOs designed to strategically address the needs identified by the data. The research implications may provide strategies to support the chief executive areas of new learnings necessary for their job performance.

Section 2 sought to understand the strategies nonprofit CEOs used during COVID to perform their duties using a qualitative design. The semistructured questions provided an opportunity for executives to share their learning experiences. In Section 3, the results guide the creation of a deliverable that can address the stated problem, the form of which would be determined based on the research results. The delivery may be a professional development plan for nonprofit CEOs, specific training to address the issues identified in the study, or a template to begin a nonprofit CEO mentor program to support new executives in their roles. Finally, section 4 reflects on the research conducted, suggests future studies to support the research of nonprofit organization executives on on-the-job learning and professional development, and makes recommendations for practice.

## Section 2: The Methodology

This study focused on understanding what learning strategies nonprofit CEOs use on the job and locate trainings and tools to address the gaps to support their identification. The nature of this inquiry was a qualitative design. This section explores the rationale, research questions, the role of the researcher, methodology, instrumentation, trustworthiness, and ethical procedures.

### **Qualitative Research Design and Approach**

This basic qualitative study aimed to identify the professional development needs of nonprofit CEOs to support their job performance. The research questions were:

1. How do nonprofit CEOs in Green Organization describe their job learning experience as nonprofit CEOs?
2. What professional development opportunities do nonprofit CEOs consider most important in helping them meet job expectations?
3. What tools and resources would the nonprofit CEO suggest to support their learning?

### **Research Rationale**

Qualitative research explores places, people, and situations in their natural environment (Creswell, 2014; Creswell et al., 2007). The central component of qualitative research is understanding a phenomenon not known or little understood (Lodico et al., 2010). Qualitative research starts with a fundamental overarching question intending to ask open-ended questions, beginning with how and why, resulting in rich data that can be used in the analysis (Creswell & Poth, 2016). Qualitative research used

the bottom up or inductive reasoning approach to collect data that included observation and open-ended interview questions (Lodico et al., 2010). Responses were grouped into codes, then theme patterns identified to develop generalizations across all participants (Creswell & Poth, 2016). I collected data through interviews and surveys and summarized the findings based on the themes in the data analysis.

The central focus of this qualitative study was to better understand the on-the-job learning experiences of a specific group of nonprofit organization leaders (CEOs) who have limited ability to request help or assistance in leadership areas that they do not know how to do, yet need to complete them in their role. Individuals who were employed learn on the job; however, this research project focused on on-the-job learning of top-level employees (Billett & Choy, 2013).

### **Justification of Research Design**

A qualitative study was appropriate since it provided the framework to understand the learning strategies a nonprofit CEO of a nonprofit organization uses in areas they do not know but need to know if they are to lead the organization successfully. A qualitative study provides rich data to understand a phenomenon studied (Lodico et al., 2010). This approach gave a voice to nonprofit CEOs, providing vital insights into the problem under study (Creswell et al., 2007). The primary qualitative research design was selected because it offered the most robust format for addressing the stated problem. The qualitative design supports the use of open-ended interview questions that aided in answering the research questions that guided this study. The research design provided a

framework for the participants to respond in their own words and share their experiences (Merriam, 1998).

One hundred and forty-six participants were emailed and asked to participate in the research by completing a survey or an interview. The decision to use an email survey to collect data was made because of the sensitivity of the responses to the questions. Nonprofit CEOs felt vulnerable revealing their weaknesses (Cornforth & MacMillan, 2016).

Data collected from the surveys were organized into categories according to the research questions. The interviews used open-ended questions with free text blocks to explore how nonprofit CEOs learn on the job, allowing participants to respond using their own words. The responses were tracked on how they handled internal (within the organization's walls) and external issues (in the community). Analyzing the public-facing image and internal leadership of nonprofit CEOs was essential to the focus of this study. I followed the same interview protocol for data collection in the interviews, whether by computer conference or in person. The interviews had additional prompts, based on the responses from the online survey, to explore further the answers provided by participants.

Other research approaches were considered but eliminated. Ethnographic research would not be the best selection since the focus was on cultural themes. The overarching theme used a broad cultural lens (Lodico et al., 2010). The grounded theory would not be a helpful tool since it is used when the research has a broad question for which there is no existing theoretical foundation to base potential answers or solutions (Chun Tie et al., 2019); workplace learning benefits from a broad theoretical base, making it an

inappropriate approach. The quantitative method was not selected because it explores relationships between known variables. Since this study was an exploration, a quantitative approach did not support the format of open-ended questions to answer the study research questions.

## **Participants**

### **Participant Selection**

The selected participants were CEOs of individual nonprofit organizations who worked under the auspices of the national Green organization association. The Green organization has a national office and independent associations located across the United States. Each Green nonprofit association has a CEO and is aligned with the national organization. There were approximately 178 nonprofit CEOs in the northeast territory, 64% male, 35% female, and 5% undisclosed. One hundred and forty-six had public emails, of which 61% were male and 34% female. I invited them to complete the electronic survey (SM) or participate in a ZI. Eighteen signed the consent, 61% male and 39% female, and 12 (11%) surveys were completed. Fifty-eight percent of the nonprofit CEOs (7) had 11 or more years of nonprofit CEO experience. Three nonprofit CEOs (25%) had been in their job for three years or fewer, and 2 (17%) had been in the role for six to 11 years. The total percentage of males and females who sent emails as the number of completed surveys, 64% and 35%, compared to 61% and 39%, respectively. For participation in the SM, 16 nonprofit CEOs consented, and 12 completed it. One state in the northeast was excluded because of my work-related relationships and the possibility that a participant may be known to me; excluding this state helped avoid any bias or

perception of bias based on this professional relationship. Email and contact information for the nonprofit CEOs within the identified region was publicly available on the internet.

The sampling method selected was purposeful sampling because it identifies targeted participants who can contribute rich information to answer the research questions (Shaheen & Pradhan, 2019). Through purposeful sampling I chose participants with a commonality of experiences with the problem being investigated; it is an appropriate selection process in qualitative research (Campbell et al., 2020).

For the second data collection stage, eight participants replied in an email with interest in a semistructured Zoom interview. Two participants did not log onto Zoom during their agreed scheduled time. The objective was to have a minimum of 10 interviews; eight nonprofit CEOs replied, and five completed the ZI. Overall, 17 (12%) individuals of the total participant pool completed the SM or ZI.

### **Research-Participant Working Relationship**

Using the online survey helped reduce bias since the respondents were anonymous (Wu et al., 2022). If the researcher knew the nonprofit CEO, the formality of the interview process (signing agreements and understanding their rights as a participant) provided them with the proper boundaries to keep the semistructured questions focused.

### **Informed Consent and Ethical Considerations**

My first concern was the protection of the participants. The study involved minimal risk to the participants and no threat to their well-being, since their responses were anonymous (Hill et al., 2021). I advised the participants of the risks involved in the email invitation and in writing before the start of face-to-face interviews. A list of all the

participants is being kept on a password-protected computer in a password-protected file. I will keep the data and materials as Walden University requires for five years.

I followed all rules and procedures established by Walden University IRB to ensure the ethical protection of research participants. I received IRB approval (06-25-21-0233788), and participants received a confidential email invitation to participate in the study with participant consent and release form (see Appendix B). I scheduled the Zoom interviews after the participants electronically signed the consent forms. In-person participants reviewed the consent form with me and signed the consent form in advance. I took all necessary precautionary steps to preserve the rights and confidentiality of the research participants. I completed the NIH (National Institute of Health) training and submitted the certificate of completion with the IRB application. I provided the participants with my contact information in case they had questions about the study. Participants were not compensated for participating in the study. All responses were kept confidential, and no identifiable part of the conversation (geography, people, or issues) was used in reporting the research results to maintain confidentiality.

### **Data Collection**

This section summarizes the data collection methods, and each data collection strategy is presented in greater depth. Two methods were used to collect data. The first step in data collection involved the distribution of a survey. A survey is an instrument selected to gather specific information based on the research questions. An email survey (Appendix B) offered a broad initial exploration of nonprofit CEO learning needs, and face-to-face interviews (Appendix G) delved more deeply into the subject. The interviews

and surveys were used to collect data specific to the research study (Hancock et al., 2021). The answers provided through both data sources provided insights into the nonprofit CEOs' experiences, understanding the learning strategies used by nonprofit CEOs on the job, and identifying training gaps among nonprofit CEO respondents. The collected responses provided data to understand the adult on-the-job learning of the participants. Using the same survey for all the participants provided the same consistency as an interview protocol. The semistructured interviews allowed me to follow up with responses to better understand the participants' replies.

The first part of the data collection process was the email invitation to request participation in the survey (Appendix B) using the (SM) platform or ZI. I collected the email addresses from the public websites of each independently operated Green Organization. The email addresses of every nonprofit CEO are kept on my SM account, and only I have the password and access to the participants' names. The responses were anonymous, and none of the nonprofit CEOs knew who else participated or answered the survey. The confidentiality of the participants is essential. If any of the participants contacted me via phone or email about the survey, I recited a statement that I could not discuss the survey details or answer questions due to the integrity of the study. However, I shared the analysis and final work with the participants once I completed it.

I gave the participants two weeks to return the completed survey via email. If the response rate was low (below 20 responses), I sent a second email to the 146 original participants to increase the reply rate. Five to 25 participants responding to a study is the range to achieve theoretical saturation (Stake, 2010). Included in this second request was

an updated letter with a statement about the importance of the research and their input and answers to the questions. Although the replies did not meet the minimum, the responses yielded recurring themes to the research questions with similar common responses from the interviews.

The initial email described the research purpose and the study, and potential participants were required to sign the informed consent form giving their permission to participate in the project. I emailed the responses to my email address for analysis, synthesis, and review. I created a password-protected email address used only for this research project.

I emailed participants an anonymous survey since it allowed each participant to answer freely and without being named. In a confidential face-to-face interview, it may be harder to get honest responses about the participants' gaps in leadership and management since it is in person. However, interviews provide time to share stories and examples in response to the questions.

The second step in the data collection included face-to-face interviews (Peasgood et al., 2023) with nonprofit CEOs who expressed interest in meeting on Zoom. Individual interviews were valuable because they provided an opportunity to follow up on the responses from the SM in greater depth and detail. I asked the same 16 questions that were in the survey. The one-on-one interviews allowed the nonprofit CEOs to expand their experiences on the job with the participants.

## Electronic Surveys

The 16 open-ended questions (Appendix B) had the participants describe their on-the-job learning in the nonprofit CEO role. These questions aligned with the research questions to ensure that they would address all of them through the SM without asking additional questions that would not serve the purpose of the study. Table 1 demonstrates the alignment between the research questions and the survey.

**Table 1.**

*Alignment of Interview Questions with Guiding Research Questions*

Research Question 1 How do nonprofit CEOs in Green Organization describe their job learning experience as nonprofit CEOs?	Interview Questions 2, 3, 6, 12, 13 and 14
Research Question 2 What professional development opportunities do nonprofit CEOs consider most important in helping meet job expectations?	Interview Questions 4, 5, 7, 8, 9, 10
Research Question 3 What tools and resources would the nonprofit CEOs suggest to support that learning?	Interview Questions 4, 7, 8, 9, 10 and 14, 15

The criterion of the population was nonprofit CEOs of the Green Organization, a community-based non-profit organization in the northeast region of the United States. I emailed an open-ended survey to 46 independently operated Green Organizations (excluding three nonprofit CEOs with prior relationships with the researcher) to get the highest number of participants (Creswell & Poth, 2016). Every currently employed CEO at a Green Organization in the Northeast United States received the survey. Email addresses were on the internet search. The nonprofit CEO must currently act in the role of

a Green Organization local chapter. No permission from the individual Green Organization was needed since the nonprofit CEOs were at the top of the executive leadership. The participants received the survey via a bcc (blind carbon copy) email, and the email included three items:

1. An email invitation explaining the research project, confidentiality, expected time to participate, and a request for each participant to choose to complete the survey or ZI. The email welcomed participants to the vital research project and thanked them for taking the time to complete it.
2. An informed consent form to participate in the anonymous study, understanding that they could stop at any time without consequence, was sent to nonprofit CEOs, who replied.
3. The anonymous survey used open-ended questions for respondents to complete and return anonymously via email to a password-secured email address used only for the project study.

The opening section of the SM described the importance of the role of the nonprofit CEO. The role of the survey was to provide an anonymous method for the nonprofit CEOs to give responses to the research questions. The benefit of using an online survey was anonymity and ease of completing and returning the form (Creswell et al., 2007). Drawbacks to the survey were the chance of low response in the return of completed surveys (Lodico et al., 2010). The nonprofit CEOs opted to participate voluntarily by replying to an email to state their interest in being interviewed for the research project. I sent each nonprofit CEO who responded an informed consent to

review and agree to participate. Once they received it, I scheduled the interview and sent them the Zoom link. While I emailed the same survey to the participant pool, the interviews provided the opportunity to ask follow-up questions based on the overall responses received. Since the emailed survey was anonymous, I did not know if the face-to-face interviewee had completed the online survey. The answers provided rich data to compare the responses between the SM survey and the face-to-face meetings for analysis. I downloaded the responses and entered them into an Excel sheet organized for the 16 questions and then grouped the questions aligned with the three research questions.

### **Zoom Interviews**

The second part of data collection was to conduct the nonprofit CEO interviews. I included the option of the ZI in the email to the 146 nonprofit CEOs. I asked them to reply to me if they were interested in being interviewed. The target for interview participants was approximately 10 participants (Creswell et al., 2007; Yin, 2017). I contacted potential candidates when they replied to the email to express interest. Participants were required to review a scripted research outline and its purpose. At the end of the email, they needed to confirm if they were interested in participating in a 45-60-minute interview. If they affirmed interest, I set the date and time to meet, record, and discuss the questions. Technology-mediated interviews occurred using Zoom.

Eight nonprofit CEOs expressed interest in the ZI, and five completed the interviews. Three participants did not sign into zoom at their agreed-upon time and did not communicate cancellation or send an email to reschedule. I compared the interview data with the findings from the SM results to minimize researcher bias. The

semistructured interviews lasted approximately 45 minutes via ZI. The meetings were held remotely. The ZI was recorded using their built-in feature that was password protected. I uploaded the recording to Otter to transcribe. Since the surveys were anonymous, I could not know if the nonprofit CEOs interviewed also completed the survey. The participants volunteered for the interview using a question on the survey. The IRB approval included details about how the nonprofit CEOs could be contacted if they wished to participate in an interview and how the face-to-face or Zoom meeting would be arranged and recorded with confidentiality in all steps of the process. The interview protocols and scripts used to contact the nonprofit CEOs on this project are detailed in Appendix B, C, and G. The face-to-face ZI were held with nonprofit CEOs selected from a pool of 146 nonprofit CEOs in the northeast section of the United States.

For the interviews, establishing a rapport with the participant was essential (Jenner & Myers, 2019). The interviewer should feel relaxed in a private space and build a relationship of trust with the interviewee. I selected an area that was quiet, comfortable, and accessible. The interviewer and the nonprofit CEO agreed upon a time that there were no interruptions. The first part of the interview reviewed the confidentiality and consent form, asked questions, and developed trust between the two individuals.

### **Reflective Journal**

Besides the SM and interview data, I used reflective journaling to provide a third point of data and support triangulation (Tomaszewski et al., 2020). During the research process, I kept a reflective journal and made daily entries in the password-protected computer notebook. The content included observations of responses from the surveys.

During the Zoom interviews, writing on the behavior, tone of voice, and inflections of response was part of the journal process. Reflective journaling enhances data triangulation (Natow, 2020). I included journal entries and reflections in interviews and reviews of the survey submissions (Billups, 2019).

### **Keeping Track of Data**

I tracked data in multiple ways. I collected the survey responses in SM. I recorded the interview notes using a Zoom recording system and then uploaded them to Otter for transcription. I kept a written, password-protected electronic reflective journal with entries completed daily once the survey email was sent to the participants.

While organizing each phase of the data collection process (email surveys and in-person interviews), I tracked all data on a password-protected Excel spreadsheet to maintain data consistency. I tracked the Green Organization nonprofit CEO contact list on SM as well and downloaded it on a password-protected Excel sheet. I entered journal reflections of my observations and reflections on a password-protected Microsoft Word document.

### **Role of the Researcher**

The nonprofit CEOs in the Green Organization have no direct supervisor-supervisee relationship with me. I work in a northeastern state with nonprofit CEOs in the Green Organization, and I excluded this group from the participant pool. I know some participants professionally through 30 years of previous work interactions and relationships with some nonprofit CEOs, and I excluded two for this reason. My current position is to provide resources and support to nonprofit CEOs in a state excluded from

this research study, so there was no conflict. My previous experiences as a nonprofit organization CEO explain the job experience.

### **Data Analysis**

First, I launched the 16 questions survey, followed by five face-to-face ZI (Natow, 2020). I analyzed data for both groups using several steps and adhered to the original plan. I conducted the analysis by combining data and coding into categories, collapsing it into common groups, and then themes. The 12 responses from the SM and the five interviews were the last phase to compare and analyze both data sets. In the final phase, I analyzed the combined data sources to compare the participants' replies in both groups (Jentoft & Olsen, 2019).

### **Evidence of Quality**

#### ***Triangulation***

Triangulation of the data (surveys and interviews) and the researcher's reflection journal of each interview helped compare data (Natow, 2020). I analyzed the responses to record patterns or similarities. The answers to the questions from the nonprofit CEOs about support, resources, and strategies they would like provided valuable information in developing the project based on the findings in this research study. I designed the project based on the study's needs identified by the participants' responses (surveys and interviews). I addressed accuracy and credibility by transcribing digitally recorded interviews, keeping a reflective research journal, and saving the responses from the SM (Jentoft & Olsen, 2019).

### ***Discrepant Cases***

There were no discrepant cases in either the SurveyMonkey or interview groups. Reporting discrepant cases is essential, as they provide a different perspective that may provide essential insights beyond the most common themes (Maxwell, 2012). The surveys had singular responses for more diversity and inclusion in training, support, and strategic planning.

### **Data Analysis Results**

The problem identified was the gap in professional development in unexpected and acute areas. The study focused on understanding how nonprofit CEOs learn skills needed for their position and what tools and resources would help improve their effectiveness. This research aimed to understand the on-the-job learning of nonprofit CEOs and the professional development needed to support them in their role. Data were collected in several steps that adhered to the original plan (Vindrola-Padros & Johnson, 2020). I emailed 146 nonprofit CEOs an invitation to participate in the study, and they had an option of completing an SM or a ZI. I launched the 16-question survey first, followed by the face-to-face ZI (Natow, 2020). SM tracked the responses anonymously and transcribed the answers. I downloaded the survey questions from SM and grouped them by research questions.

Most nonprofit CEOs self-selected how they would participate. I set up an Excel spreadsheet in each tab by the state, the nonprofit CEO's name, email address, and SM (SurveyMonkey) or ZI. Two participants asked what I needed for the project and agreed to the ZI. When they replied, I scheduled the interview. When participants returned their

consent, I recorded the agreement date and emailed them the survey link or a calendar invitation of dates for ZI. I assigned chronological numbers to the nonprofit CEOs, such as nonprofit CEO 2, based on when they responded to the agreement to participate in the study. Twelve surveys were submitted, and I completed five interviews out of the eight people who initially provided consent. Although the objective number of participants was not reached, patterns emerged in the transcriptions that made it possible to conduct data analysis (Johnson et al., 2019).

The data analysis process involved condensing each transcript's responses into categories using open coding (Adu, 2019). The second step was to combine standard axial codes or phrases (Linneberg & Korsgaard, 2019), which I noted with a highlighter and documented in the Excel spreadsheet. The third step was to align (Appendix G) responses to the research questions. The fourth step was documenting reoccurring themes within the responses that emerged through the coding process (Billups, 2019). I collapsed the raw data from the survey answers into groups and reduced them to themes (Williams & Moser, 2019). I analyzed the categories of groups and compared them to Kolb's four cycles of an experiential learning model that was used to understand the data provided by the participants. Using the research questions as a framework, I analyzed the combined data sources by comparing the participants' replies in both SM and ZI groups (Jentoft & Olsen, 2019).

## *Surveys*

SM tracked the responses anonymously, and I transcribed the interviews. I transcribed each submission according to the survey question and participant. I printed survey questions from SM and grouped them by individual questions.

The next step was to use a yellow highlighter to group similar responses by each of the 16 survey questions. I grouped common responses using open coding. Open coding is a process where collected raw data are organized intentionally by categories to understand the groupings of the data (Williams & Moser, 2019). The groups were further collapsed using axial coding. I added the groups to an Excel spreadsheet according to the research question to visibly identify the five top common themes that emerged.

The survey questions aligned with each research question. I grouped common answers for each question and collapsed them into categories. I entered each nonprofit CEO's response on the master Excel spreadsheet in survey question order according to the research question. Most of the replies were one or two sentences and included tracked keywords. I reviewed the participants' responses to each open-ended question on the grid. The spreadsheet grouped them by responses within groups and color codes, so patterns were easy to observe for repeated answers.

The second round of data analysis included the review and classification into color-designated groupings of the responses for each question to see if there were overlapping answers in the categories between the two groups (Roberts et al., 2019). I tabulated the most common keywords of replies in each survey question by tracking the responses from the interviews and survey responses. I counted the number of times an

answer was repeated in the submission. I counted the highest frequency of responses and put them into the five categories that emerged from the data. I put them into a tab on the spreadsheet and grouped them according to the research questions, and the top themes began to emerge.

## **Survey Results**

**Research Question 1:** How do CEOs in Green Organization describe their job learning experience as nonprofit organization CEOs? The themes that correlated with this research question included crisis management and communication, the value of a nonprofit CEO peer network, understanding fiscal processes, and HR and staffing issues.

***Theme 1: Crisis Management and Communication.*** Nonprofit CEOs, especially those leading during COVID, shared stories in the surveys about the incredible challenges they addressed during the peak of the pandemic. A common sentiment shared among the nonprofit CEOs, nine of the 12 who responded, was that they did not know what they did not know when they took the helm of their respective organizations. It was the most common reply with statements from nonprofit CEO 2 “keeping the doors open while you furlough staff and try to pay bills with no revenue stream.” Nonprofit CEO 2 used every resource available to stay in business. “There is no playbook for this.” Nonprofit CEO 13 shared that COVID has been the most draining experience. Nonprofit CEOs 4, 8, 9, 12, and 14 shared critical events prior to COVID, such as serious legal, fiscal, and Acts of God events that challenged their nonprofit CEO skills as they responded to the issue. COVID highlighted the gaps in training and support, but respondents also noted that these gaps in competencies were present before the pandemic.

***Theme Two: Value of CEO Peer Network.*** *The peer CEO network* was vital to the nonprofit CEOs' ongoing learning. Another important on-the-job learning was peer support. Nonprofit CEOs shared that their peers provided vital support as a sounding board and a safe place to share their ideas and strategies. CEOs 3, 5, 6, 9, 10, and 14 shared that this peer network was the only place to share challenging situations with a trusted colleague. Nonprofit CEO 15 said it was what kept him sane. Nonprofit CEOs 10 and 14 recommended that regions arrange more peer time between CEOs to develop deeper trusted relationships among each other.

CEOs reported that they felt lonely in their role and shared that they had to be careful who they could discuss their challenges and worries. CEOs 6 and 9 joined a professional organization, not affiliated with Green Organization, which they found beneficial. CEO 3 and 5 relied on regular interaction with other Green Organization peers to discuss challenges with the board of directors, community collaborators or elected officials.

***Theme Three: Importance of Understanding Fiscal Management.*** Like most nonprofit organizations, Green Organizations need revenue to operate and stay in business. Eight nonprofit CEOs admitted they had weak fiscal management skills, and nonprofit CEO 11 and 16 taught themselves or took classes to learn how to read a balance sheet or profit-and-loss statement. Nonprofit CEOs 1, 3, 6, 11, and 16 shared that more advanced fiscal management training is necessary to do their job effectively.

Most Green nonprofit organizations have tight budgets so understanding finance and budgeting is key to remaining sustainable. CEOs 6 and 11 understood that financial

acumen and having a diverse business model were critical to the nonprofit keeping their doors open. CEO 16 articulated that understanding short and long term finances was the key to his nonprofit organization's success in achieving their budget goals.

***Theme Four: Board Development, Engagement, and Governance.*** A board of directors runs nonprofit organizations (sometimes called a board of trustees). These policy volunteers have the organization's fiduciary responsibility and oversee the nonprofit CEO. In the nonprofit CEO's role, they engage the board to raise money, prepare and implement strategic plans, and oversee the operation. The board's engagement was a common response, with nonprofit CEOs (1, 3, 6, 7, 12, 14, and 16) who appreciated their board members' increasing involvement during COVID. Nonprofit CEO 14 shared that the organization was stronger because of engaged members who were committed to keeping the organization in business during the pandemic. Nonprofit CEO 7 had frustrating experiences with board members. He replaced a long-serving nonprofit CEO and had a board that was not engaged. It made it difficult to make decisions and get their support for Green Organization. Nonprofit CEO 13 stated that few board members were active in discussions or meetings, leaving it to the nonprofit CEO and their staff to make organizational decisions. Nonprofit CEOs 5, 7, 14, and sixteen felt strongly that more training and workshops were needed to increase knowledge of the board's vital role.

***Theme Five: Human Resources and Staffing Challenges.*** Staffing of Green Organization is one of the organization's highest expenses. Staffing issues were critical in several areas. With limited fiscal resources, Green Organizations could not afford to raise

salaries competitive with local communities' companies. Five of the 12 nonprofit CEOs were frustrated that they could not substantially revise their breakeven budget to increase pay. Others shared concerns about work culture and environment and the difficulty of working in a people-facing business during a pandemic. Thirteen nonprofit CEOs shared that "staff are worried about their health and do not want to work," and "pay is so low, and it has impacted morale." Nonprofit CEO 2 said they had to reduce capacity since they could not hire enough staff to operate the program.

**Research Question 2:** *What professional development opportunities do nonprofit organization CEOs consider most important in helping meet job expectations?* This question focused on exploring the nonprofit CEOs' experiences in this role and what they would find most useful to support their success in the position. The codes that emerged from this process included the value of peer CEO network, benefits of training, belief in lifelong learning, and fundraising.

**Theme One: Value of CEO Peer Network.** The most frequent response from the nonprofit CEOs was the value of a peer network, with six of 12 including it in their reply. Most of them had created a group of trusted colleagues to connect with and share challenges and issues within their roles. They viewed these trusted relationships as a source of solid professional growth and support. The National Green Organization hosts two events annually for nonprofit CEOs, which many reported as useful. Each of them, in addition, has found their own group to support them. Nonprofit CEO 9, new in the position, shared, "It was a safe place to exchange challenges and refreshing to hear that the others in the group had the same issues." Nonprofit CEO 10 said, "They would not

have survived the first few months of the pandemic without their peer's support and a listening ear.”

***Theme Two: Executive Training.*** Green Organization offers internal training, some of it required for nonprofit CEOs. Seven nonprofit CEOs (1, 3, 5, 6, 9, 11, and 12) of the 12 CEOs responded to the importance of training, particularly crisis management and communication. Nonprofit CEOs 1, 8, 10, and 11 found the preparation training helpful and appreciated the opportunity to meet other CEOs from other parts of the country. Nonprofit CEO 5 stated, “it provided basic information on organizations, risk management, and boards, but more is needed.” Nonprofit CEO 13 and nonprofit CEO 14 found other organizations for training, change management, and fiscal management. Nonprofit CEO 14 and nonprofit CEO 16 regularly listened to podcasts or met with other community nonprofit CEO leaders in a learning circle. The recurring comments were the need for additional training to address the changing skills of a nonprofit CEO, specifically in crisis management and communication. CEO 7 said, “You do not know what you do not know till it happens. I wish I had been more prepared to handle the crisis and communication part of leadership.”

***Theme Three: Ongoing Professional Development.*** Another common reply was the essential mindset of being a lifelong learner. Nonprofit CEO 8, a CEO of a small facility, shared, “the job is always changing, and you need to be learning all the time to keep ahead.” Another shared that COVID “made me see the value of keeping an open mind and being open to change since it is constant.” Two CEOs interviewed felt strongly that their ongoing professional development was important to their successful job

performance and their responsibility. They needed to make it a priority to attend trainings and meeting to expand their knowledge and learning.

***Theme Four: Partnerships and Collaborations.*** Opportunities to gain experience were shared by many of the nonprofit CEOs. Five of the 12 shared that their leadership as nonprofit CEOs changed with COVID. They needed to connect with local organizations and collaborate outside their building to support the community. Four nonprofit CEOs shared excitement about expanding outside of their facility, stating, “it was rewarding to support the families in the community during a challenging time.” Another shared, “it gave us an opportunity to try something new and expand our offering, make a difference, and have an impact.” Green Organizations provided food for needy families, and a few offered community-based childcare to essential workers. Many CEOs reported feeling proud that their organization could provide needed services during COVID.

***Theme Five: Fundraising.*** Nonprofit CEOs reported an increasingly important value of fundraising for their organization. Nonprofit CEO 12 said it best when they shared, “Ask for donors for money, ask donors for advice.” Nonprofit CEO 4 said they “could fundraise during the pandemic and wanted to continue the success.” Nonprofit CEO 2 and 13 expressed frustration that the board of directors was not engaged in fundraising for their organization. Nonprofit CEO 16 said, “they were not interested in fundraising.” The board and staff are partners in fundraising (Uyar et al., 2021), and success depends upon this common goal. Nonprofit CEOs 4 and 11 stated the importance of fundraising when aligned with the mission of Green Organization.

Nonprofit CEOs' support from each other before and during COVID was the most common response in the surveys. The connection of the peer nonprofit CEO groups and developing trusting relationships with each other encouraged them through tough decisions. Goitom (2020) supports the value and benefits of a CEO peer network. Nonprofit CEO 13, CEO 16, and CEO 17 reported a mindset of being a lifelong learner. Nonprofit CEO 6 said, "you need to be motivated and open to ongoing learning to keep up with changing times."

The traditional internal workshops offered nationally were useful but needed to be more content and align with the unexpected day-to-day events that occur (be more practical than theoretical). Finally, the benefits of community collaborations were mentioned by nonprofit CEOs 4, 5, and 8 as a key factor in managing the impact of COVID and their organizations' sustainability.

**Research Question 3:** *What tools and resources would the CEOs suggest supporting their learning?* This question was developed to acquire insights into nonprofit CEOs' recommendations for tools to support success based on their own experiences. The most common results of this exploration included an appreciation for the value of additional support in communication under organizational crisis, nonprofit CEO peer networks, human resource management, fiscal, facility, and board governance.

**Theme One: Crisis Management and Communication.** Nonprofit CEOs shared in their comments on the survey the importance of accessing more training and resources during a crisis, including handling public-facing and internal communication. Seven of the 12 nonprofit CEOs commented, "Communication and delegation are key," and

another stated, “Focus on the positive and source other Green Organization ideas to dig out of the hole that COVID created in our business model.” Finally, when asked what type of PDT would be beneficial, the response from nonprofit CEO 6 shared was, “I wish I had known more about crisis management and media relations.”

***Theme Two: Value of CEO Peer Networks.*** Nonprofit CEOs reported that the connections and trusted relationships with peers were an essential element in the professional development of the CEO. Six of the 12 stated how important peer support was to them. Nonprofit CEO 12 said, “the best learning has been being involved in peer learning circles.” Nonprofit CEO 9 responded, “just the opportunity to network with other nonprofit CEOs and share challenges and successes was key.” They attended the national nonprofit CEO training and found it beneficial in their executive role. Nonprofit CEO 4 shared the value and benefit of networking with their peer group.

***Theme Three: Human Resources and Staffing Challenges.*** Staffing was a key part of Green Organization. Nonprofit CEOs shared that the staffing training was valuable pre-COVID. Nonprofit CEOs 2, 4, 5, 8, 9, and 11 responded that the pandemic exposed the weakness in the structure. Nonprofit CEOs 1, 6, and 11 shared that they felt unprepared for the human resource knowledge and skills needed during COVID, and nonprofit CEO 2 wished they had more training. Nonprofit CEO 12 stated, “Learning how to have tough conversations with staff” during this period was difficult. Nonprofit CEO 9 wanted to “explore the cost of turnover vs. implementing a staffing structure with higher full-time staff.”

***Theme Four: Board Governance, Engagement, and Development.*** Nonprofit CEOs rely on their board members to guide and support them through the good and the tough times. Five of the 12 nonprofit CEOs shared their experience with their board members. Three said they had no engagement, and six reported increased engagement and support. Nonprofit CEOs clearly articulated the importance of a board that was skilled and knowledgeable in the role. One shared, “Coming to terms with the fact even though they could fire you, and they look to you (CEO) for direction.” Every board member needs to be committed to the organization, and a nonprofit CEO recommended, “Do not just fill the board seat with someone your gut says is not appropriate.” Each board member needs to be engaged in collectively supporting the organization and upholding their fiduciary role.

***Theme Five: Importance of Understanding Fiscal Management.*** Five nonprofit CEOs reported they lacked fiscal skills (operating, capital, government, and endowment) when they started in the position. Three nonprofit CEOs completed a class independently in fiscal accounting to ensure they had the skills to understand the numbers, analyze the position, and make an informed decision. Nonprofit CEOs 4, 5, 7, 9, and 11 shared “More financial management trainings, fiscal forecasting.” Nonprofit CEO 13 stated, “More finance options, federal grants.” Finally, nonprofit CEO 14 thought there was a need for “new tax credits incentives and financing options.”

***Theme Six: Facility Management.*** Four of the Green Organizations facilities are old and in need of repair. Nonprofit CEOs expressed the need for additional training in “building renovation, deferred maintenance, repair, and upkeep.” Since the services were

offered in the facility, the condition of the building was important to the customer and the staff. Two noted they operated in an old building that needed updates and repairs. Operating an older building was challenging, especially during COVID. They did acknowledge that it was challenging before the pandemic.

The key perspectives that emerged were under the overall heading of what skills and information nonprofit CEOs need to manage during a crisis (COVID). Nonprofit CEOs strongly expressed the value of having increased skills in managing a crisis and the internal and external communication integral to leading through tough times. The responses clearly stated the extraordinary stress that the pandemic had on their operation and leadership. Many reported not feeling adequately equipped or knowledgeable and stated, “there is no playbook,” and another reported, “their objective was for their organization to survive this crisis.” Their peer nonprofit CEO community had a strong role in their leadership during this time and shared the value of developing relationships with this group to support each other.

### *Interviews*

I used Otter to transcribe the interviews on my password-protected computer. I uploaded the recorded ZI into Otter AI for transcription. I reviewed the transcriptions and asked each interviewee to read them and confirm if they accurately reflected what they had shared. If it was not, I asked them to revise it. No one made any revisions to their interview transcripts. The goal was to have 20 surveys and 10 interviews. No assistant was needed to be hired to sort through the raw data. I analyzed the data manually and

stored hard copy data in a locked cabinet. I locked the digital records in a password-protected personal computer.

I reviewed the responses to the interview questions (Appendix B) and analyzed them individually. I filled the Excel spreadsheet with the research questions and coded by patterns in their replies. I used a highlighter pen to identify and note recurring words, codes, and related observations.

In the third step, I grouped the common nonprofit CEOs' answers into five themes from the data. Patterns emerged from answers to the interviews retrieved from the individual transcriptions. I added the groups to an Excel spreadsheet according to the research question to identify the five top common themes that emerged.

In the last step, I grouped responses to the survey questions and interviews by research question (Table 1) to compare and analyze the themes separately and combined.

### **Interview Results**

The interviews revealed the incredible challenges nonprofit CEOs address in their position. Each of the five executives reported an extraordinary event (legal, fiscal, facility, or program) that involved rapidly learning new information and creating internal and external communication. Most felt they could have been more prepared when dealing with the press and public communication. During these events, they relied heavily on their peer nonprofit CEOs and board members for support and exchange of ideas.

Two of the five nonprofit CEOs who participated in the interviews had been in the role for under three years. The remaining three had been in their current position for seven, twenty-two, and twenty-five years. The long-term nonprofit CEOs relied heavily

on their long-standing nonprofit CEO peer network and expressed dependence on the National Green nonprofit CEO trainings. The two newer nonprofit CEOs found the internal national trainings beneficial equally to the peer nonprofit CEO networks. Recommendations for future professional development were similar between the two groups.

**Research Question 1:** How do nonprofit CEOs in Green Organization describe their job learning? The themes correlated with this research question included leading through uncertain times, employees, and the organization's facility. The nonprofit CEOs reflected on their experience and what they had to learn in this role.

***Theme One: Crisis Management and Communication.*** The challenges of COVID were mentioned in all five interviews. Nonprofit CEOs 2, 5, 7, 11, and 13 said, “dealing with a crisis and resiliency.” Navigating the uncertainty during the closure of operations was difficult for both new and seasoned nonprofit CEOs. Two shared that leading during this time and trying to understand what to do was stressful. Each of them had a network of trusted colleagues (both internal and external) to share in their experiences, which was beneficial. A strategy shared by nonprofit CEO 12 was to break down a situation “into parts and tackle it in small parts so that it was manageable.”

***Theme Two: Human Resources and Staffing Challenges.*** Developing, hiring, and compensation at all levels of staff was essential. All five interviewed participants reported that staff shortages impacted their operations and the organization. Hiring and keeping staff for front-line work was difficult, especially during the pandemic. Nonprofit CEO 3 said, “Struggling with retention of hourly employees was complicated.”

All the challenges of fiscal management (all types) and understanding the financial aspect of the position were shared by all. They shared a philosophy of being a lifelong learner. Four nonprofit CEOs sought outside trainings to expand their learning in fiscal and management, particularly leadership. They listened to podcasts, went to graduate school, attended targeted workshops, and studied history and religion. All of them reported that professional development benefited their growth in these areas.

***Theme Three: Facility and Building Management.*** Outdated buildings needing updating were the reality for three of the five participants. Three reported having little or no finance for construction, renovation, or purchasing. They had to learn as the project progressed, and nonprofit CEO 8 “learned that they would change how the work and design were done in advance.”

Each shared a severe event that the organization encountered, requiring crisis management and communication (internal and external). During this period, they worked closely with their boards to develop a plan to implement. Awad (2021) found that boards, during challenging times, increased engagement with the nonprofit CEO. In each crisis, the nonprofit CEO had to lead and create a strategy to resolve it unexpectedly. All of them reported that COVID was incredibly stressful and isolating. In their executive role, they were limited with whom to share their challenges, which was difficult.

**Research Question 2:** What professional development opportunities do nonprofit CEOs consider most important in helping meet job expectations? As noted in the analysis of the surveys, the focus of this question was for the nonprofit CEOs to reflect on their experiences in this role and what they would find most useful to support their success in

the position. The recurring responses in this iteration of data collection included the participants' identified need for additional overall professional development in training, change management, and human resources.

***Theme One: Executive Training.*** Four interview participants shared the importance of leadership development at all levels of staff. They stated that they intentionally invested in staff to attend workshops and trainings. Nonprofit CEO 12 said, "it was part of their responsibility to support their professional growth" since "someone had taken the time to invest and support their career growth." The five nonprofit CEOs were motivated to take charge of their own learning and professional development and joined external local community nonprofit CEO groups or Vistage. Nonprofit CEO 16 found Vistage. It is a private group of nonprofit CEOs across all industries sharing experiences and challenges in their roles. In addition, all connected with other colleagues regularly to exchange successes and challenges. They found this invaluable to their professional development.

***Theme Two: Importance of Understanding Financial Management.*** The finances during the pandemic were uncertain and unstable. During COVID, there was no revenue coming into the business. Three of the five nonprofit CEOs expressed the need to learn about complex fiscal challenges such as handling banks and loans, tax credits, endowment management, and forecasting skills – all of which were necessary for the organization's sustainability.

***Theme Three: Leadership Change Management.*** Change or leader management was a common thread in the interview responses. Understanding how to develop

organizational strategies to lead a nonprofit organization is a necessary skill set. Four of the five had to address extraordinary circumstances that required skills and resources to be kept confidential to develop a plan to manage the situation. They shared, “I had to learn along as they moved forward” and had to find experts to collaborate with and “learn what they did not know to resolve the matter.” In each situation, the buck stops with them, and in their role, they had to decide what difficult decision was best for the organization. Understanding what one needs to know to decide on an unfamiliar event is tough. CEO 9 summed it up by stating, “Surrounding yourself with great people” is important.

***Theme Four: Human Resources and Staffing Challenges.*** The hiring, keeping, and compensation of all levels of staff is vital to the organization. All the nonprofit CEOs shared their concern for their employees. All of them stated they had strong teams and valued their input. Part-time hiring and staffing were difficult, and they were working to address it. The two newer nonprofit CEOs were still adjusting to their positions. When handling staff reorganization, one nonprofit CEO learned that when “you examine a painful staff reduction event, cut once, not twice, to ensure that you come out at the back end, you do not have to duplicate it.”

***Theme Five: Crisis Management and Communication (internal and external).*** All five nonprofit CEOs had experienced a crisis that needed to be managed and communicated internally and externally. They relied on several key board members and trusted colleagues. None of them reported that training offered by the national organization was useful during this time in their role. The crisis suddenly occurred,

requiring the nonprofit CEOs to act quickly to create a team of experts to partner with and resolve the matter. All crises at each local Green Organization needed experts to support them in developing a plan of action. All events were known in the community requiring a public response and communication plan. Four nonprofit CEOs wished they had the training to manage a crisis in advance. They felt it would have been greatly beneficial.

In the interviews, each nonprofit CEO shared that their nonprofit CEO peer group was their key training and support. These relationships, as well as those with key community leaders, sustained them and helped them advance and strengthen their professional skills. All had attended the national executive training and stated it was useful information but looked elsewhere to find beneficial nonprofit CEO training for their professional growth.

**Research Question 3:** What tools and resources would the nonprofit CEOs suggest to support their learning?

This research question sought insight into recommendations for supporting nonprofit CEOs based on their own experiences in the role. The most consistent responses included an increased opportunity for nonprofit CEO peer networks, professional development in fiscal management, crisis communication, and human resources.

**Theme One: Value of CEO Peer Networks.** All five nonprofit CEOs found and participated in internal and external networks to support them. All found them useful and

necessary. They suggested that the national office hosts more events with “opportunities for nonprofit CEOs’ to interact, network, and develop relationships with each other.”

***Theme Two: Importance of Understanding Fiscal Management.*** The interviewees discussed the importance of understanding how to read and analyze financial reports (profit-and-loss) statements, cash flow, forecasting, debt restructuring, government funding, and endowment. Four nonprofit CEOs indicated they needed more training in all aspects of finance. Three of them had completed a workshop or class outside to gain the skills necessary to understand the financial report. A CEO said, “You are going to be alone, making these decisions.” Furthermore, nonprofit CEOs shared that “the higher you rise in the leadership ladder, the more painful it is going to be.” Nonprofit CEOs 13 and 15 sought executive professional training outside Green Organization to build resilience and communication skills.

***Theme Three: Crisis Management and Communication (internal and external).*** Each interviewee had experienced a crisis during their tenure as a nonprofit CEO. In reflecting on their experiences, they wished they had had more training in “crisis management and communication” and access to additional resources or people to help with the learning curve to become acclimated to addressing and resolving the crisis. It would have benefited them to have more tools to access instead of finding them on their own.

The partnership between the nonprofit CEO and their board of directors is essential, especially during a crisis such as COVID. All the interview participants reported strong relationships with their board's key members. In addition, they shared that

the board members were engaged and partnered with the nonprofit CEO during the crisis to determine the best path forward. One nonprofit CEO said the conversations with peers got him through this difficult event. Their support was an essential support to him during this time.

***Theme Four: Human Resources and Staffing Training.*** The overarching theme of recommended trainings had two outcomes. First, peer nonprofit CEO relationships were essential for every nonprofit CEO interviewed. It is their trusted group of people in similar jobs who could share experiences to listen to and support each other. These can be meetings, social events, and retreats.

The second was the need for more critical operation trainings in the key areas listed above. Fiscal management, board development, staffing, and crisis management directly impact the nonprofit organization's sustainability. Any knowledge gaps in the nonprofit CEO skill set would make leading difficult. In a nonprofit organization, the CEO reported that frequently they did not have the content matter experience and competencies in addressing the press, public meetings, debt restructuring, or serious staffing issues. They recommended that these topics be included in future nonprofit CEO workshops.

#### ***Integrating Observations from the Reflective Journal***

The reflective journal was beneficial to the research findings, especially regarding the interviews. I kept daily notes during the data collection process that journaled insights on survey responses and reflections on the interviews conducted. The journal entries were helpful during the four steps used to analyze the data, in which SM and ZI responses

were grouped and tabulated separately. I organized each group by similar replies, put them into codes and groups, and reduced them to themes. I compared the SM and ZI groups to analyze common themes between them. I reviewed the notes and compared them with the findings. After careful analysis, I identified no differences in the participant responses from the journal notes.

In the notes, during the survey period, several nonprofit CEOs were curious about this project study, and four stated that they felt it was important to understand what trainings nonprofit CEOs feel would benefit them. Their survey responses were detailed and described “a passion” for their organization's work. They cited their faith in God and commitment to the mission of the nonprofit organization as key motivation points when their job was difficult. Each nonprofit CEO shared a collective belief that they would get through COVID.

The interviewees eagerly shared their stories in their nonprofit CEO roles and were transparent about their struggles with managing crises and feelings of isolation, and they stated the essential value of key trusted colleagues and board members to work through complex issues. I was impressed with the demanding situations they encountered in their roles and how they developed a plan to address their crises, albeit learning the plan as they were implementing it. My notes reflect their resilience in securing a supportive peer community and their essential openness to ongoing learning. Each of the interviewed nonprofit CEO supplemented their workshops, such as fiscal management and leadership, with independent learning, such as podcasts, Vistage, and think tanks, to broaden their knowledge base.

### ***Data Analysis of Combined Sources***

I created headings for the most common responses from both the survey and interview data and synthesized them with the three research questions to extract relevant themes. These themes summarized the responses from the nonprofit CEOs who completed the survey and interviews. For data triangulation, semistructured interviews allowed the opportunity to ask face-to-face questions and explore more detailed answers in addition to the survey responses.

Once I analyzed the SM responses and the interviews, I compared both to assess similarities or discrepancies between the two groups of respondents. I organized the most frequent responses into categories of the data by research question. The results also included a section on low-frequency responses. I inserted the repeated comments in order and reviewed for themes or trends shared by the nonprofit CEOs.

### ***Combined Themes from Interviews and Surveys***

I compiled the final analysis of the data collected from the SM and face-to-face interviews separately into categories to collapse patterns and themes in the experiences shared by the nonprofit CEOs. Next, I combined the responses to surveys and interviews. After comparing them, I summarized and synthesized the responses to extract themes and draw conclusions. I identified 11 themes identified in the analysis results. The data analysis results, and summary are presented in Table 2.

**Table 2.***Alignment of Survey and Interview Themes*

Research Question	Survey Themes	Interview Themes	Common Themes
How do CEOs in Green Organization describe their job learning experience as nonprofit CEOs?	Crisis Management and Communication CEO Peer Network Understanding Fiscal Management Board Development Human Resources/Staffing	Crisis Management and Communication CEO Peer Network Human Resources/Staffing Fiscal Management Facility and Building Management	Crisis Management and Communication CEO Peer Network Fiscal Management Human Resources/Staffing
What professional development opportunities do nonprofit CEOs consider most important in helping meet job expectations?	Peer CEO network Internal Training by National Office External – Lifelong learner Partnership and Collaborations Fundraising	Peer CEO Network Leadership and Management training Vistage Fiscal Management Human Resources	Peer CEO Network Internal Organization trainings
What tools and resources would the CEO suggest to support that learning?	Crisis Management and Communication Human Resources and Staffing CEO Peer network Board Governance and Development Fiscal (all aspects) Facility Management CEO Peer network	Crisis Management and Communication Human Resources and Staffing Peer CEO Networks Board Development Fiscal Management	Crisis Management and Communication Human Resources and Staffing Peer CEO Networks Board Development Fiscal Management

Paulen (2021) and Westemajer (2021) supported the responses to Research Question 1. CEOs of nonprofit organizations were under extraordinary stress because of the pandemic. Johnson et al. (2020) found that COVID-19 had a detrimental impact on

organizations. The financial strain and human resources toll on the nonprofit CEOs leading their organizations during this period was tremendous. Nonprofit CEO 12 stated, “There was no playbook for COVID, and the rules changed rapidly.” Nonprofit CEO 16 shared, “it took a tremendous toll on our staff team.” Being a nonprofit CEO in non-COVID times is equally stressful. During the interviews, each of the five nonprofit CEOs shared incredible unanticipated legal and fiscal challenges to address, which changed their leadership perspective (Goitom, 2020). Nonprofit CEOs' primary adjustment was innovating how to revamp the Green Organization business model to remain sustainable.

Overall, the data analysis indicated a need for a revised nonprofit CEO preparation and training for the role, especially in crisis management and communication and in operations of the organization (fiscal, board, staff). Most participants expressed the substantial value of the peer nonprofit CEO relations as essential support.

### ***Relating Themes to Kolb's Experiential Learning Cycle***

Kolb's cycle is broken into four cycles. I compared each of Kolb's cycles to the three research questions and aligned them with the themes. The four cycles are: concrete experience, reflective observation, abstract conceptualization, and active experimentation. The codes and themes that emerged from this study reflect the framework provided by Kolb. Adults learn through experience, and Kolb's experiential learning cycle aligns with the on-the-job learning of nonprofit CEOs of nonprofit organizations (Kolb, 2014).

The three research questions aligned with the four cycles of Kolb's theory. In all the responses, participants shared an event, reflected on the learning, and then described

how they would apply it to future situations. Many shared the incredible value and benefit of discussing their challenge and having someone to process it with, to ask questions to enhance reflection, and to help determine the next steps. Several nonprofit CEOs shared concrete experiences, such as COVID, and described how connecting with a fellow nonprofit CEO or board member provided an excellent sounding board to reflect on the event. Based on their conversations, they developed and implemented the next steps in the organization.

Many nonprofit CEOs answered that most of their learning was experiential on the job. They discovered that the most beneficial learning was from reflecting with fellow nonprofit CEOs about how to apply or implement their learning. Nine of the 12 survey participants and all interviewed participants shared that they had to learn quickly on day one in their role. They shared a similar statement about the need to figure it out. The on-the-job learning could be in response to an unexpected urgent crisis (such as legal, fiscal, or COVID). Nonprofit CEO 3 stated the experience of “leading through uncertainty, providing the confidence to the staff that they could create and implement a plan of action and monitor its effectiveness.”

**Concrete Experience (CE).** The concrete experience is defined as being involved with a new experience or interpreting a previous one in a new way (Kolb & Kolb, 2005). The person engages in an activity and a concrete experience, such as the nonprofit CEO hosting a community forum. It is the first of the four cycles of Kolb’s experiential learning model.

I structured the interview and survey questions to answer research question 1. The questions asked the participants to share their experiences in the SM and ZI about their roles. In both the surveys and interviews, the nonprofit CEOs discussed various experiences during COVID and pre-COVID. These stories of their on-the-job learning were in areas they were not knowledgeable about and had to learn in their role. Various particularly challenging experiences were discussed in the interviews and written in the surveys. These concrete experiences had a powerful impact (such as managing through COVID) on the organization and required the nonprofit CEO to learn new skills to lead and manage through it.

**Reflective Observation (RO).** The reflective observation is the person reviewing and reflecting on their experience. Research questions one and two were designed to align with the reflective observation stage. The opportunity to reflect on an experience allows sharing their observation (Kolb, 2014). In the surveys, many participants described their lack of experience, for example, regarding aging buildings or debt restructuring, and the need to understand it to do their job effectively. During the interviews, each person detailed several areas (legal issues, crisis events at their facility) and the strategies to understand what they needed to learn. They appreciated their trusted peer nonprofit CEO network, which supported them during this period. The ability for a nonprofit CEO to reflect on their experience (such as COVID), especially with a peer, provides an organic method to think through the event and reflect on what they learned and how to address the events.

**Abstract Conceptualization (AC).** In this stage, the individual is concluding and learning from their experience. Research questions one, two, and three were designed to elicit experiences of the nonprofit CEOs' on-the-job learning. They shared stories about what they had to learn and how they developed a plan to increase their knowledge. Staffing and fiscal management examples during COVID were the most common experiences. The nonprofit CEOs, after reflection, developed a plan to lead and manage the organization to the next stage of Kolb's experiential learning cycle.

**Active Experimentation (AE).** The last stage is planning and trying what you have learned. Research questions one and three align with this part of the cycle. It provides an opportunity for the participant to share a new way to approach this experience. In responses to both survey and interview questions, nonprofit CEOs reported on those areas in which they had no previous experience and for which they started experimenting and developing a plan to keep leading the organization forward. The nonprofit CEOs reported catastrophic events in the organization and the pressure of leading through them in the organization, staff, and public. Additional skills, competencies, and support were required to move ahead and address the crises directly. Implementing a pilot or testing a plan to address the event is the last part of the experiential learning cycle. It takes the nonprofit CEO from the initial event to the last step, applying and implementing what was learned.

### ***Evidence of Quality***

**Triangulation.** When comparing the data, I incorporated triangulation of the data (surveys and interviews) and my reflection journal entries from each interview (Natow,

2020). I analyzed the responses to record patterns or similarities. The answers to the questions from the nonprofit CEOs about support, resources, and strategies they would like provided valuable information in developing the project based on the findings in this research study. The project will be a three-day professional development workshop designed to provide hands-on training in the key theme areas identified by the study participants. I designed the project based on the study's needs identified by the participants' responses (surveys and interviews). I addressed accuracy and credibility by transcribing digitally recorded interviews, keeping a reflective research journal, and saving the responses from the SM (Jentoft & Olsen, 2019).

### ***Summary of the Data Analysis Results***

This study addressed three research questions. The first was: How do nonprofit CEOs in Green Organization describe their job learning experience as nonprofit CEOs? The summary of the common themes is crisis management and communication, CEO peer network, fiscal management, and human resources/staffing. The responses provided insight into the CEOs learning on the job.

Ten of the 12 nonprofit CEOs commented they were “learning as they go,” and another nonprofit CEO stated they worked in new ways with their board and staff to survive the impact of COVID. Crisis management and communication were identified as the most frequent on-the-job learning, while nine of the 12 stated crisis management as a challenge in their role. Several responses shared experiences prior to and during the pandemic. Seven out of 12 participants shared the value of resilience and a coping mechanism for their on-the-job learning. The value of learning crisis management skills

was supported by research conducted by Lyman-Torres (2018), Putnam-Walkerly (2020), and Sargeant and Day (2018). Many nonprofit CEOs reported they felt ill-equipped for the intensity of crisis management and communication, which are closely aligned (Freeborough, 2020; Tyler, 2018). During COVID, three nonprofit CEOs reported furloughing 95% of their staff and trying to understand how to make payroll. The pandemic increased fiscal management and human resource expertise skills needed by the organization. The reflections on their experiences, especially resilience, is a common theme found in other corporations (Tait, 2021).

The second research question was: What professional development opportunities do nonprofit CEOs consider most important in helping meet job expectations? The commonly combined themes were peer nonprofit CEO networks and internal organization trainings. Nine nonprofit CEOs shared examples of gaps in their preparation for critical competencies. Additionally, they stated that they wished they had more professional development in these areas. The third research question was: What tools and resources would the nonprofit CEOs suggest to support that learning? The most combined common responses were crisis management and communication, human resources and staffing, peer nonprofit CEO networks, board development, and fiscal management. This response provided the key areas of training requested by nonprofit CEOs and will be incorporated into the project.

The survey and interview analysis results identified 11 themes based on the research questions. The findings were similar between the two groups, with nonprofit CEOs' strong need for ongoing opportunities to connect and support each other in peer

networks. The remaining themes were the need for ongoing and more executive training in key operational areas of nonprofit organization leadership and management. Examples of training topics include fiscal management, human resources, crisis management and communication, and board development and governance.

For example, a frequent response to the survey was the need for more crisis management and communication training. Dealing with COVID showed a gap in education on leading effectively through an unanticipated crisis. As one nonprofit CEO shared, the pandemic brought various gaps in his knowledge, such as massive layoffs, government quarantine regulations, and sudden severe revenue losses.

Top codes, such as training in crisis communication, fiscal management, and value of nonprofit CEO peer network, were common answers. Nonprofit CEOs also shared the gaps in their knowledge areas (i.e., board development and human resources) being tested during the pandemic as a challenge. They also shared that the benefit of talking with other nonprofit CEOs was an essential factor in leading during uncertain times.

**Discrepant Cases.** There were no discrepant cases in either the SurveyMonkey or interview groups. Reporting discrepant cases is important, as they provide a different perspective that may provide important insights beyond the most common themes (Maxwell, 2012). The surveys had singular responses for more diversity and inclusion in training, support, and strategic planning.

**Project Deliverable.** The proposed project genre is a 3-day PDT for nonprofit CEOs. It would be an interactive workshop to engage participants and develop

connections with each other during this 3-day experience. The training would include purpose, goals, outcomes components, timeline, and trainer notes that incorporate the study findings and learn from the literature review in Section 3 in this area.

Section 2 summarizes the methodology of the study. This section includes the research design, participants, data collection, data analysis, and data analysis results.

Section 3 includes the sections of the final project study.

## Section 3: The Project

### **Introduction**

The project will focus on a three-day PDT to address the gaps in knowledge identified by the nonprofit CEOs of the Green Organization. The three main themes are crisis management and communication, fiscal management, and CEO peer network. Tools and resources will be offered to increase knowledge and competencies in the three themes.

The purpose of the PDT is to offer specific instruction in gap areas that were the most frequently stated in the interview and survey responses by CEOs of the Green nonprofit organization. It is designed to instruct this elite group of executive leaders in the necessary skills to succeed. Learning outcomes will be identified in two ways. A pre-assessment will be completed when registering for the training. The learning outcomes for each area will be identified, and they are: (a) Participants for each training will work in groups of 4 over the 3-day training experience on collaborative projects to develop trusting working relationships; (b) Participants will be able to prepare a balance sheet, a profit and loss statement, and budgets and cash flow statements; (c) Participants will create a plan to manage a crisis and the communication plan to deliver it to all stakeholders. At the end of the 3-day training, they will review the overall learning outcomes and their own expectations that they shared in the pre-evaluation. The expected outcome is that the CEO groups will remain connected to interact and support each other after the training.

The target audience are recently hired CEOs from nonprofit organizations who are new to this position. The professional training would be offered bi-annually so that the CEO would attend within their first six months. The research results identified areas where new nonprofit organization CEOs were unprepared when they started in their role.

The 3-day training will include up to 24 CEOs in groups of 4. Each group will be assigned a project related to the three themes identified. They will be given a case study in crisis management and communication, fiscal challenge, and lastly, use the time in the CEO work groups to develop relationships and connections sustained after the training. Each group will have time during the three days to work on resolving each study and then present it to the rest of the groups for feedback from the other groups to increase learning.

The training outline (see Appendix A) will include the advance preparation to send the pre-assessment, sample agenda, training guide with details on materials, case studies, and group presentations for each assignment and room set up and the post-assessment evaluation. The trainings will run from 9-5:30 pm for 3 days, with a breakfast break between 8:30-9 am and a 45-minutes lunch break, as well as two breaks for participants to interact and connect.

The goals of the proposed project are to increase knowledge and understanding in the three key areas identified by CEOs in which they were limited in experience when they first started in their role. The training will provide hands-on experiences and suggested strategies to address the three key areas. The CEO groups will develop and strengthen their relationships within the nonprofit CEO peer support group. Most participants stated in the study that the peer nonprofit CEO support group was a critical

connection, especially in a crisis or conflict. The group presentations share different options suggested as problem resolutions and methods to address the key issues in the group project. They can share feedback on each other's strategies to address the issue in each scenario, offering opportunities for additional learning and perspectives.

### **Goals**

By the end of the 3-day PDT, nonprofit CEO participants will be able to create a crisis communication plan template for their organization and have it ready for their organization. They will prepare a budget and read financial statements to understand the fiscal position of the nonprofit organization. The nonprofit CEOs will create a peer network meeting schedule for the next six months to share challenges and opportunities and to ask questions.

### **Rationale**

The PDT was selected based on the findings of the research study. The three most common responses by participants in describing their lack of knowledge were crisis management, communication, and fiscal management. They also shared that they relied on their peer CEOs to share struggles and receive and give support. This elite group would benefit from a specific 3-day PDT to address these gaps and support their professional competencies in the top three themes identified in the research.

The 3-day PDT will provide content-based learning in the three areas identified by study participants. It will focus on concrete areas of the themes and create a group CEO learning experience to encourage the CEO peer network experience that was valued in the responses by participants in the study.

## **Review of the Literature**

The databases used to search the literature were Google Scholar, ProQuest Central, SAGE Premier, and Taylor and Francis Online. The search words used on each of these databases were *CEOs professional development, nonprofit organization CEOs and financial management, nonprofit CEOs gap in learning, CEO experiential learning, learning in a nonprofit organization, CEO leadership, nonprofit CEO leader, and CEO nonprofit learning on the job, adult learning and the CEO, CEO and board relationships, CEO organizational performance and adult learning, nonprofit CEO leadership, and executive leadership, and adult learning*. Articles published in the Harvard Business Review, Stanford Innovation Review, and BoardSource were also accessed. The literature review covers PDT, crisis management and communication, financial management, and CEO peer network.

### **Professional Development Training**

The purpose of PDT is to provide an educational experience to a targeted group to improve knowledge and understanding in a specified area (Deng et al., 2021). PDT is essential for nonprofit CEOs. Newman and Ford (2021) shared that the training is critical for executives to participate in regular PDT to adapt to the changing landscape in their community. Stewart and Kuenzi (2018) found in-person PDT was the most beneficial for adult learning. Van Wart et al. (2019) supported the benefits of PDT experiential learning. Furthermore, they found the immersion education experience increased self-efficacy and internalized application of the training (Van Wart et al., 2019).

Gratton's (2021) research connected the benefits of PDT, organizational development, and the strategic planning of the nonprofit organization. Nonprofit CEOs need continued training in leadership development skills to sustain the nonprofit organization (Gratton, 2021). Aboramadan and Dahleez (2020) found that individuals who participated in PDT during their careers were more likely to be hired as a CEO and continue their learning. Appe and Schnable (2019) found that nonprofit organizations without PDT or other support were weaker and less sustainable than organizations where leaders participated in regular training.

The PDT for CEOs should begin before they reach the level of nonprofit organization CEO (Lim et al., 2021) to prepare for the position. Ongoing training for the nonprofit CEO, as with any top leadership, is critical to their professional development (Buchholtz, 2021). The genre of PTD for top executives in all fields, including nonprofit organizations, has continued to grow and expand rapidly (Beard & Wilson, 2018). Gerton and Mitchell's (2018) research supports expanding training and recommends focusing on the complexity of nonprofit organization service. In exploring the career pathways of CEOs, Norris-Tirrell et al. (2018) found that the PDT was a strong factor in the longevity of nonprofit CEOs remaining in their role. Before the 1980s, ongoing nonprofit CEO PDT was limited and not valued (Lee, 2021). Current research on PDT for the nonprofit CEO is an intentional and ongoing training plan for leaders to remain relevant in their role and keep up with the changing times (Brenner & Heyman, 2019).

A PDT for nonprofit CEOs is an excellent match with the adult learning of a CEO. Kolb's model demonstrates how adults learn (Kolb, 1984). The design of the PDT

should align with the four cycles in Kolb's model: concrete experience, reflective observation, active experimentation, and abstract conceptualization (Kolb, 1984). The interactive process is effective (Deng et al., 2021) with nonprofit organization CEOs who must think critically through issues to make sound decisions (Worth, 2020). Adults learn best through experiential learning (Searing et al., 2021). A strength of PDT for attendees is the experience of practicing and collaborating on new skills with each other to increase understanding (Shumate et al., 2018).

### **Content of the Professional Development Training**

The results from the research study support PDT in addressing the gaps in their knowledge identified by the nonprofit CEOs. Three key themes identified areas these executive leaders stated were missing in their career training. Kolb's experiential model (1984) work in adult learning found that the most effective way to instruct adults is in person, using the four learning cycle stages. Nonprofit CEOs must understand their learning style (Cumberland & Nielsen, 2021) to effectively internalize the information being taught.

The three-day PDT will include training in crisis management, communication, and fiscal management to increase knowledge, skills, and strategies. Brown's (2019) study supported creating a nonprofit CEO peer network that encourages African American female nonprofit CEOs. These CEO networks supported nonprofit organization CEOs in their work to build capacity for their organization to increase work in the community (Worth, 2020). Nonprofit CEOs would benefit from gathering in a safe and

trusted space to share struggles, ask questions, and support each other (Dewar et al., 2020).

Blankenship (2022), Stewart and Kuenzi (2018), and Schultz (2020) supported the value of executive leadership training that prepares the CEO for their role. Hultman (2022) identified four behaviors that successful CEOs have mastered. The behaviors are making decisions with speed and conviction, engaging for impact, adapting proactively, and delivering reliably.

Executive leadership comprises many skill sets (Kuenzi & Stewart, 2021). In the CEO role, the individual needs to think strategically (Golensky & Hager, 2020) and understand the importance of communication in all situations (Chick, 2019). CEO coaching has been an effective tool for new hires (Mason & Kim, 2020), especially during the first few months. Learning how to lead and manage through change is supported by the research of Akingbola et al. (2019).

### **Crisis Communication and Management**

Creating a crisis and communication plan is the first important step (Curnin & O'Hara, 2019) for a nonprofit organization. It should include possible events, such as active shooter, weather, and public health issues (Tait, 2021). Understanding how to manage and lead through a crisis is essential during emergencies (Goitom, 2020). The staff, board, and community expect the nonprofit CEO to guide them. Preparing and rehearsing the crisis plan with the staff is critical (Schultz, 2020). Tait's (2021) research supported the development of a comprehensive plan for a crisis. Nonprofit CEOs shared that during COVID, they felt unprepared for the demands of this unexpected pandemic

and struggled to develop strategies to lead the organization (Maher et al., 2020). They had to adapt quickly. The nonprofit CEOs emphasized that frequent communication with internal and external stakeholders was essential for their organization. For CEOs, survival during an emergency requires being proactive and prepared (Vang, 2020).

Managing the finances during a crisis was also an important part of the preparedness of staff (Ebdon, 2021). Mason and Kim (2020) supported the need for board and management partnerships in communication during a crisis to support the organization. The resilience of the nonprofit CEO during a crisis was an important indicator of how well the organization would manage during that period (Tait, 2021).

The role of the nonprofit CEO, as the leader of a non-profit organization, is to be the spokesperson. Coule and Bain (2021) found that nonprofit CEO power and the nonprofit organization are co-mingled, and their value as figureheads cannot be understated. They also need core competencies in their role, even in areas where they do not have experience or expertise. The relationship and engagement between the nonprofit CEO and their board is a critical skill during a crisis (McAuley, 2019). Benson-Rea et al. (2021) and Gazley and Kissman (2022) supported the importance of ongoing interaction between CEOs and their board.

COVID was an example of the challenges and stress nonprofit organization CEOs endured during this time (Frumer & Breen, 2021). Prochnow et al. (2022) found difficulties nonprofit CEOs had in keeping current, during COVID, with the rapid influx of new information and necessary communication to respond and make a responsible

decision. During an emergency, it is important to access as much information as possible to determine the next steps.

### **Financial Management**

Many nonprofit organizations struggle financially, and the value of a knowledgeable nonprofit CEO in understanding financial statements, for example, is a key element in their success in the position (Eckhart-Queenan et al., 2019). Aranda (2020) found the financial literacy of the nonprofit CEO and their board was a key factor in their longevity in the position. Hankin et al. (2018) and Finkler et al. (2022) supported the importance of the nonprofit CEO having an understanding and working knowledge of the organization's finances. COVID forced nonprofit CEOs to address unexpected turbulent times and instant loss of revenue. These executives needed to know how to lead during this period (Maher et al., 2020). They also need to at least break even in the annual budget to remain sustainable (Beaton, 2021).

This financial strain was stressed by the staffing crisis and increased employee pay due to minimum wage changes and shortage in the workforce. A new ROI (return on investment) due to COVID has impacted nonprofit organizations (Perry Jones, 2022). Amandolare et al. (2020) found that nonprofit organizations were hit harder than profits in this area. Nonprofit organizations have a smaller profit margin, making the options even more difficult. Nonprofit CEOs need financial skills, such as understanding cash flow and operating statements, to remain sustainable (Johnson et al., 2020).

## **CEO Peer Network**

The opportunity to share their successes and struggles with other nonprofit CEOs was strongly supported by an important connection between them (Dewar et al., 2020). Connecting with a colleague to discuss a challenge or ask for advice was valued and essential, especially during a crisis like COVID. The research supports this experience (Schultz, 2020). This trusted relationship between peer CEOs supports and challenges each other (Lee, 2022).

These peer networks can provide support in many ways that have value to all participating nonprofit CEOs. Examples of how they share and connect are through executive coaching (Katz, 2021), training (Golensky & Hager, 2020), change management and innovation (Parris et al., 2018), and leadership (Hultman, 2022).

The research found that the succession planning and transition of the nonprofit CEO influences the value of the peer support network. Transitions and onboarding are stressful periods (Corbett & Strawser, 2020), and the gaps between the leader (Stewart & Twumasi, 2020) and the relationship between the board of directors and CEOs need to be addressed (McMullin & Raggio, 2020).

## **Summary**

Nonprofit CEOs have complex jobs requiring a wide range of skills and a body of knowledge to be successful in this role. The data analysis found three key gaps essential to the nonprofit CEO's success. These nonprofit CEOs reported that they wished they had this training before starting their positions. The 3-day PDT will provide experiential learning to increase competency in the three gap areas.

## **Project Description**

The 3-day PDT (Appendix A) will be offered to newly hired nonprofit organization CEOs. Upon registration, they will complete a preassessment outlining the 3-day agenda and goals of the training and ask them to share their goals and expectations for the training. It would be submitted to the training facilitator as part of the registration. The collective responses will be shared with the CEO group at the beginning of the first day of the training. Each participant will be assigned a financial term and is expected to bring the definition and share examples at the three-day training.

## **Needed Resources and Existing Supports**

CEOs have busy schedules, so the training dates would need to be scheduled at least six months in advance in a centrally located facility designed for 24-person group training. The training will be offered for three consecutive days. The room needs six tables, eight feet long, projector, screen, and laptops. The room must be large enough to accommodate the four groups of six to work on the projects. There must be comfortable chairs and space for food (breakfast, lunch, and breaks). Room space, food, and technology would be confirmed two weeks before the first day. Name cards will be created in advance and used for the entire training.

The instructor will have a PowerPoint, teacher notes, and handouts ready one week in advance. The PowerPoint will include the agenda, 3-day training, goals of the training, and a pad and pen for each participant to take notes.

One resource needed is a course description of the training that outlines the goals, content, and registration details, using a Google forms link to insert in an email. The 3-

day training will be promoted at national federated nonprofit organizations to target new nonprofit CEOs. LinkedIn has many nonprofit organization groups where information about the training can be shared. The registration would be open for four weeks, and the training would be held six months after the close of enrollment. It will require a projector, a large screen, and a computer for the PowerPoint slides.

I have an extensive network of nonprofit organization senior leadership colleagues to support the training, such as conducting a practice run of the professional development to ensure it goes smoothly. They also have access to meeting spaces with parking in central locations.

### **Potential Barriers and Potential Solutions**

CEOs, especially when new in their position, have difficulty going away for a 3-day training. They must have a staff person who can manage the day-to-day experiences while they are out of the office. The coverage for the CEO, while they are out of the office, can be particularly challenging and stressful. Another barrier may be an in-person meeting. There may be CEOs who are more comfortable in a Zoom training than a face-to-face training.

Practical solutions are to schedule the training at least six months in advance to provide adequate time for the CEOs to prepare a staff member to cover for them while they are away. An option to address the reluctance to meet in person may be to have the participants become acquainted via Zoom in advance and select an appropriate location to hold the conference, such as Puerto Rico or New Orleans.

**Implementation**

The 3-day training will be offered on July 19, 20, and 21, 2023. The promotion and registration of the training will be open from January 9 to February 3, 2023. The registration is six months in advance for CEOs to plan their time out of the office. The agenda is in Appendix A.

**Roles and Responsibilities**

There are several roles and responsibilities to lead this training. I will prepare the promotion and registration materials to circulate to new nonprofit CEOs. I will create a plan to distribute to federated nonprofit organizations (such as Girl Scouts, United Way, JCC, YMCAs, and YWCAs). I will arrange and secure the training space and equipment for the in-person professional development. During the 3 days, I will arrange for work coverage so I can lead the training without interruptions.

**Project Evaluation Plan**

A formative evaluation will be completed for the project. Formative evaluation provides valuable information identifying possible weaknesses in the training design (Hopkins & Meyer, 2019). Formative evaluation is the preferred method for revising trainings (Lyon et al., 2019). Buelin et al. (2019) reported that formative evaluation enhanced the learning experience for the participants. I selected a formative evaluation because it is important to revise and improve the project so it can be at the highest level when presented in the PDT for new nonprofit CEO participants. Two experienced nonprofit CEOs will be selected as evaluators. Their feedback will provide recommendations for revisions to the instructor regarding the content and training design

of the project. The evaluators will not be participants in the PDT. I am the instructor, and I will use the recommendations from the evaluators to improve the project based on the feedback from the experienced nonprofit CEOs.

The overall goal of the formative evaluation is to learn ways that the PDT can be revised and improved. The evaluation comments are useful for constructive feedback regarding aspects of the project that should be edited to revise and improve the proposed training. Recommendations suggested to the instructor will be used to revise and strengthen the training design and presentation materials. Appendix A shows the evaluation instrument to be used by the evaluators.

### **Project Implications**

This project will create positive social change by having better-prepared nonprofit CEOs who lead organizations that provide a safe place for children while their parents are at work and offer safe and clean housing to vulnerable populations. Thousands of nonprofit organizations in the United States provide essential services in their local communities. Nonprofit CEOs, as leaders of these organizations, have a vital role in supporting communities nationwide. Each nonprofit organization has a strategic plan with goals that support its mission within the community. The skills and knowledge needed to lead during easy and challenging times are critical. The 3-day PDT will educate the new CEOs and better prepare them for their role.

The project will prepare nonprofit CEOs to lead their organizations to accomplish their strategic goals, such as providing food distribution centers to food-insecure communities and engaging socially isolated senior citizens. Nonprofit organizations can

provide a safe place for children to learn while their parents are at work. All these services will create positive social change that can only be achieved with a skilled and knowledgeable CEO. Therefore, social change is the nonprofit CEO leading the way to offer essential services, such as housing for the homeless, meals to the food insecure, and safe childcare for working parents.

The positive social change implication of the project is that new nonprofit CEOs who participate in PDT will learn new skills, based on the research findings in this study, to support their success in their role as nonprofit CEOs. In the larger context, this PDT may be able to support nonprofit CEOs and expand to experienced CEOs. A review of the literature on the four key PDT areas aligns with my research results. A project evaluation has been included to monitor progress or growth in the areas of improvement of their PDT.

## Section 4: Reflections and Conclusions

### **Project Strengths and Limitations**

#### **Project Strengths**

There has been limited research on how nonprofit CEOs gain competencies in gap areas needed for job success. Gap competencies are areas of knowledge that a CEO does not have but needs in their position. The literature has explored leadership in a new era (Dewar et al., 2020), the sustainability of nonprofit organization leaders (Beehner, 2019), overall nonprofit organizational management (Worth, 2020), and strategic leadership (Golensky & Hager, 2020). Gap competencies of what a CEO needs to be successful in their position have not been studied.

The 3-day PDT addresses the gaps identified in this study. The training focuses on the top three areas CEOs wished they had been more prepared for. During the three days, practice scenarios of the top themes (crisis communication and management, fiscal management, and CEO peer network) will be presented. The CEO participants will work in small groups to create and present their proposed resolutions to the problem.

#### **Project Limitations**

A limitation of the professional development deliverable would be the diversity of the participating CEOs' competencies and their individual knowledge gaps (Norris-Tirrell et al., 2018). The training may not apply to every type of limitation in the target audience and may not meet their professional development needs (Dewar et al., 2020). There may be CEOs with expertise in finance but who need to increase their knowledge in human resources or marketing.

Another limitation would be that the training is condensed into three consecutive days instead of being offered once a month for three months. Their training may not apply to every limitation in the target audience. It may not meet their individual needs. It is difficult for CEOs to be out of the office for three consecutive days and get coverage. However, attending this training over three months would reduce the connection and camaraderie of being together for three consecutive days.

### **Recommendations for Alternative Approaches**

Alternative approaches to resolve the gaps in new CEO knowledge would be to author a white paper that would outline the problems and recommend solutions to resolve the problem. It would provide resources and other training organizations for new CEOs to connect with to further their professional development.

To study the problem differently, I would focus on the career trajectory of the CEOs and the professional development they attended over the past 10 years and analyze if there were any correlations among them. This would provide an in-depth study of the identified gaps and the strategies used over a longer period to gain experience, skills, and knowledge in these areas.

### **Scholarship, Project Development, and Leadership and Change**

#### **Scholarship**

At the start of the doctoral process, I thought the topic of scholarship was understanding the difference of opinion of a particular area by individuals who shared their viewpoints. The main sources used were specific publications such as a nonprofit

organization newspaper or newsletter. I also used my 14 years of experience in the nonprofit organization sector as a resource to stay current in the field.

What I learned during the topic of scholarship was the importance of peer-reviewed literature and research on CEOs and nonprofit organizations to increase the knowledge base on this overall topic. Secondly, I discovered the importance of the mindset of ongoing continuous mastery scholarship in the field.

### **Project Development**

Project development is a complex and detailed process. It requires developing the concept of the project with clear outcomes and deliverables. Once established, a plan is developed to create activities and content that will support the goals and deliverables. The project development leader needs to have the skill of facilitation and mastery of details of each step of the plan as well as skills in relationships and specialized teams to perform the specific tasks of each section of the plan.

### **Leadership and Change**

An organization has leaders who navigate changes that occur internally and externally. During COVID, CEOs had to lead through the uncertainty of the pandemic. Understanding the connection and relationship between leadership and change is an important skill of a nonprofit organization CEO. I learned that leadership and change are intricately connected. Leaders must be able to steer the nonprofit organization during the ups and downs of the community and in the greater world. Change can be planned or unexpected, and the CEO needs to be prepared to handle both types.

**Reflection on Self as a Scholar**

There are many learnings in my reflection as a scholar. During the research project for my study, I thought daily about the value of becoming a scholar. Initially, my mindset was in the role of a student, learning about the topic. As time passed, and as I read several peer-reviewed articles and research on this topic, my perspective as a scholar began to change. As I became more familiar with the work of fellow researchers and gained comfort in reading research, the switch to being a scholar occurred internally.

The transformation as a scholar progressed as I learned more about the academia and research in higher education and adult learning. During the course of my attendance at graduate school, I began to see things differently, ask questions and do research on unfamiliar topics to better understand them.

**Reflections on Self as a Practitioner**

The increased learning in the field of adult education was substantial. Preparing the research study and data collection and analysis were key factors in my professional development as an educator and practitioner. As the research study progressed, my skills as a practitioner improved by asking better questions, using other peer-reviewed tools to expand my thinking in this area, and using data and the work of others to support the process. My critical thinking skills developed during the research process. I actively explored wider range of peer reviewed research to increase learning to improve problem solving and exploring ideas in a different way. These experiences changed the way I think and process ideas.

### **Reflections on Self as a Project Developer**

The creation of the project was a terrific learning experience. Project development is a complex and detailed process. It provided the opportunity to gain experience in creating professional training for nonprofit organization CEOs from the results of the data analysis in the study to address the gaps identified. As the developer of the professional training, I thought about the best method of instruction (online, hybrid, or in-person) but decided on in-person since the CEO role requires interaction, collaboration, and working with all types of people.

The project will provide a three day PDT to increase the knowledge and understanding of the themes identified. I created the training design as a hands-on experiential learning module using Kolb's (1984) model. The content is organized to create challenging situations in the three key themes for the small groups of CEOs to resolve and present their recommendations to all CEO participants.

Working in small groups to resolve the problem will offer CEOs experience in developing problem-solving skills and working with other CEOs to resolve the issue. The opportunity to observe the other group presentations, provide feedback, and answer questions will increase CEOs' skills to create a solution to address the situation.

In creating this project, I learned to think about what I wanted the CEOs to have learned at the end of the three day training. Then, I included the three themes from this research study identified as gaps by the CEOs. The next step was to develop the three day agenda with activities and resources to provide an experiential environment for the participants to maximize learning.

### **Reflection on the Importance of the Work**

Nonprofit CEOs are isolated and need many skills to lead an organization through good and challenging times. The findings in this research found the key gaps (crisis management and communication, financial management, and CEO peer network) that nonprofit CEOs identified as skills needed to be successful in their role. The creation of a PDT to address this problem is important. Learning from the training will increase knowledge and the success of nonprofit CEOs in their roles, which will lead to the success of nonprofit organizations. These nonprofit organizations provide a needed variety of services, such as food for the hungry, safe supervision for teenagers, and housing for the homeless to local communities across the United States.

### **Implications, Applications, and Directions for Future Research**

#### **Implications**

The positive social change will be creating better-prepared nonprofit CEO leaders to guide organizations that provide childcare, services to senior citizens, and job training programs for individuals needing skills to gain employment. The 3-day PDT will provide a learning experience for nonprofit CEOs to increase their skills in the identified gap areas, which are crisis management and communication, financial management, and CEO peer network.

Nonprofit CEOs are the leaders of the nonprofit organization and set the future of the organization. A nonprofit CEO with the necessary skills, knowledge, and understanding can positively impact social change by being able to achieve the organizational mission and goals. Some examples of how this positive social change can

be accomplished are: providing safe housing and job training to foster children aging out of the system who need a new home, community, and support system, as well as offering English as a second language class to immigrants. A nonprofit organization can distribute meals to communities with food insecurity or provide free or low-cost health services locally. All these positive social changes need to be led by a skilled and knowledgeable CEO who can successfully implement these types of services.

### **Applications**

This 3-day training can be taught as a class to prepare individuals interested in becoming nonprofit CEOs. It can be offered across the United States in any meeting space that accommodates 24 people. It would provide an opportunity to educate people interested in becoming a CEO.

### **Directions for Future Research**

Understanding how nonprofit CEOs learn skills and competencies in their gap areas is essential to their success. The CEO position is complex and always changing, so understanding how they learn new skills is critical. The more that is understood about the on-the-job learning of this elite group, the better prepared the CEO will be in their role.

Future research can explore alternative ways to increase learning, providing these PDTs before they become CEOs. A longitudinal study on how CEOs gain competencies in their gap areas over a five- or 10-year period would be useful for future training and professional development. Researching the training for nonprofit board members to support the CEO may also provide strengthen the relationship and collaboration between the two groups.

## **Conclusion**

The nonprofit CEO has a key role in leading positive social change in their nonprofit organizations based on the organization's mission. Every nonprofit organization focuses on impacting their community in ways that align with their organizational goals. Trained and skilled nonprofit CEOs lead social change by offering programs and services to end food insecurity and providing homes to individuals and families who are housing insecure. Nonprofit CEOs have a challenging role. They report to a board of directors and lead staff to deliver services to their local constituents. Nonprofit CEOs shared that they had a limited group of people with whom they could share the gaps in their abilities during a crisis when they had to learn missing skills or increase knowledge in the gap areas. The three-day PDT based on this research study addresses the new nonprofit CEOs' ability gaps and may resolve them. The PDT will enable the nonprofit CEOs to bond and support each other in their nonprofit organization service and community leadership roles to have a stronger impact. New nonprofit CEOs come to their position with missing skills needed to effectively perform their role. The PDT was developed to aid the new nonprofit CEOs in developing and gaining their missing skills.

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## Appendix A: The Project

### General Overview

The 3-day PDT is designed to address the gaps identified by current CEOs who shared competency areas they wished they had when they started their role. The in-person training will provide interactive scenarios in small groups to collectively develop skills and knowledge in the top three themes of the research study.

### Purpose

To increase knowledge and understanding in the three key areas by CEOs starting their role in a nonprofit organization

### Goals

By the end of the training, the CEOs will increase their knowledge and competencies in three key areas. They will be able to create a crisis management and communication plan, read a balance sheet and profit and loss statement and prepare a budget. They will also schedule a date for future CEO check-ins between the participating CEOs to develop and sustain a network.

### Target Audience

The target audience are newly hired nonprofit CEOs.

### Timeline

The 3-day PDT would be scheduled six months in advance, with registration starting at the same time. At registration, a pre-assessment would be included as they enrolled in the training. It would be held in person on 3 consecutive days from 9-5 pm.

#### Materials

The materials used in the training will be a PowerPoint, written scenarios on crisis management and communication, and a fiscal management challenge. There will be an icebreaker (welcome activity) to encourage developing relationships and connections between the CEOs.

#### Location

The training will be held at a centrally located community center or college that can accommodate twenty-five adults at six tables with an area for food (breakfast, breaks, and lunch)

### **Description of the PDT**

#### **Day 1:**

Total time of training day: 8 hours

Registration and breakfast 8:00-9:00 am

**Welcome, Icebreaker, Introduction, and Review of Agenda** (9:00-10:00 am) Slides 1-

6

- Name
- Tenure in current position
- Personal Expectations from training

**Financial Management Overview** 10:00-12 noon Slide 7-8

Each group meets with their financial report/system – and combines their learnings (30 minutes)

Each group presents their group's definition with a purpose to make sure all areas are covered (90 minutes) – each group has 10 minutes.

**Lunch** 12-1:00 pm

**Fiscal Scenario** 1:00-2:00 pm (3 different versions will be distributed) Slides 9-10

- Questions to review the scenarios
- Assignment for the group fiscal scenario
- Select a presenter and a scribe (slide 10)

**Financial Scenario Presentations and reflection** 2:00-3:00 pm Fiscal Scenario work completed and presentations by three groups (Slide 11)

**Financial Scenario Planning Switch situations** 3:00-4:00 pm Slide 13

Group 1 reviews group 2 plan

Group 2 reviews group 3 plan

Group 3 reviews group 1 plan

**Presentation of group review of plans** 4:00-5:00 pm Slide 14

**Day 2**

**Breakfast and networking** 8:00-9:00

**Welcome and recap of Day 1** 9:00-9:30 Slide 15

**Crisis Management and Communication** 9:30-10:30 am Slide 16-18

- Participants are in pairs (4 pairs work on scenario 1, 4 pairs on scenario 2, and 4 groups on scenario 3 (1 hour)

**Break** 10:30-10:45

**Participants come together to combine the work of the pairs** 10:45-11:45 Slide 18

- The participants combine by scenario group (1, 2, and 3) and share their crisis management and communication plan. The 8 participants of each group work together to develop a communication management plan.

**Lunch** 11:45-12:30

Three groups continue to complete the timeline for crisis management and communication 12:30-1:30

**Presentation of the Crisis Management and Communication plan** 1:30-2:30  
(Scenario 1 & 2)

**Break** 2:30-2:45

**Presentation of Scenario 3** 2:45-3:15

**Feedback on the presentation:** 3:15 -3:45

**Wrap up and homework** – video interviews for crisis communication 3:45-4:00 pm  
Slide 19

**Day 3**

**Breakfast and networking** 8:00-9:00 am

**Welcome and recap of day 2** – 9:00-9:30 Slide 20

**Crisis Management and Communication** – 9:30-10:30

Groups of 8 (3 scenarios) (Use the phone to record video (Videos/) Slide 22 Interview

- Situation 1 – reporter scenario 1 – switch -
- Situation 2 – member – scenario 2
- Situation 3 – parent -scenario 3

**Crisis Management Continued** – 10:30-11:30 am

Continue taking turns to be the interviewee and interviewer 11:30-12noon

**Lunch** 12:00-1:00pm

Groups of 8 (3 scenarios) (Use the phone to record public video meeting 1:00-2:00  
Slide 22

- Situation 1 – Scenario 1 – Parents

- Situation 2 – Scenario 2. Members
- Situation 3 – Scenario 3. Community

**Continue with public meeting simulation** 2:00-2:30 pm

**Self-reflection** 2:30-3:00 pm Slide 23

What you want from a CEO Peer network – what you can contribute and what you want to receive (a give and an offer)

**Break** 3:00-3:15

**Action steps** 3:15-4:45 pm – Share; you give and offer to the group and share action steps on how you will stay connected and support each other. Slides 24 and 25

Wrap-up and evaluation adjournment 3:45-4:00 pm Slides 26 and 27

## Project Evaluation Plan

Name of evaluator: \_\_\_\_\_ Date: \_\_\_\_\_

Thank you for taking the time to review the 3-day PDT for new nonprofit CEOs. Your feedback and recommendations will be used to strengthen the training experience for the CEO participants.

1. What is your feedback on the overall goals of the 3-day PDT for the new CEO.

The goals of the PDT are to increase knowledge and understanding in fiscal management, crisis management and communication and develop a peer CEO network to support each other in our roles. Do you have any suggestions or revisions?

2. The training focuses on three areas, and they are fiscal management, crisis management and communication, and developing a CEO peer network with this group of participants. Can you share your feedback on:

- a. Fiscal Management Overview
- b. Fiscal Management Scenarios
- c. Crisis Management and Communication
- d. Development of the CEO peer network over the course of the 3 days.

Do you have any other suggestions or recommendations on the training design, materials used, and flow of the 3 days to improve the training?

Thank you for taking the time to review the training and provide feedback.

Date:

CEO Participant evaluation

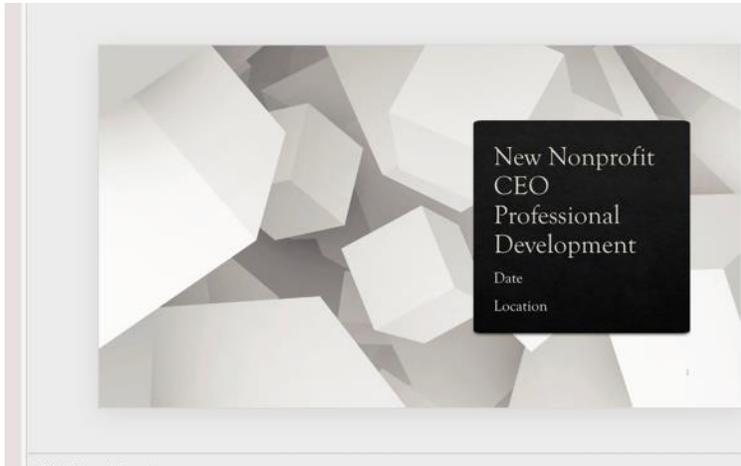
Thank you for attending the 3-day PDT for new nonprofit organization CEOs. Please take a few minutes to share your experience and learnings. Your feedback will be used to evaluate and improve the training.

1. Please review the goals and expectations you submitted at registration. The goals of the training were to increase knowledge and understanding in fiscal management, crisis management and communication, and develop a peer CEO network to support each other in our roles. Please share if they were met and what part of the training was the most meaningful.
2. Please provide feedback on the following topics and share the strengths and areas that can be improved.
  - a. Financial Development and Management
  - b. Crisis Management and Communication
  - c. CEO Peer Network
3. What was the most relevant and beneficial part of the training and why?
4. What was the least relevant and why?
5. Any suggestions to improve the training?

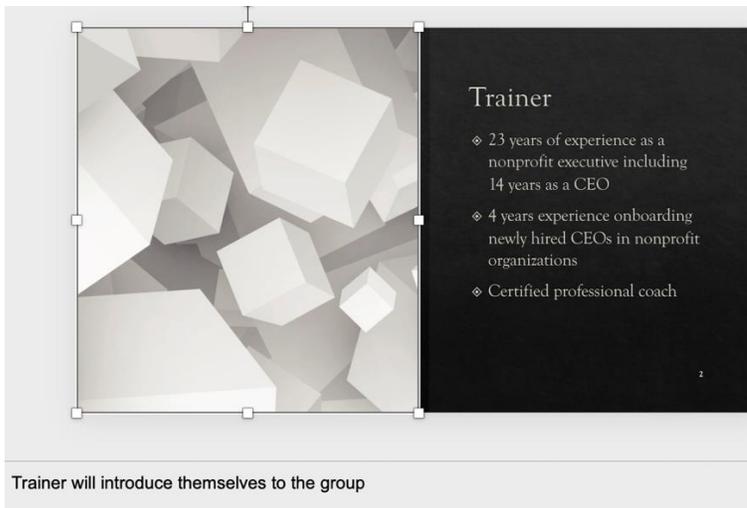
Thanks very much!

PowerPoint

Professional Development Training



Slide 1



Slide 2

## Introductions

Name

Your organization's name and location

How long have you been on the job as CEO?

How long have you been in nonprofit leadership?

What do you expect to learn from this training?

What do you do for fun?

Participants will be paired with another person and will ask the questions – Person A will introduce Person B and vice versa to the rest of the group

Slide 3



## Welcome

Agenda – Day 1

- ◆ Introductions
- ◆ Training Goals for Training
- ◆ Fiscal Management
- ◆ Crisis Management & Communication
- ◆ Wrap up – Day One

Trainer will review the agenda for day one, share the breaks and lunch schedule and location of bathrooms. The CEOs will be asked to put away phones and other devices so they can be fully present for the professional development training.

Slide 4

## Goals of Professional Development Training

Prepare new CEOs in the areas:

- Fiscal management
- Crisis Management and Communication
- Develop a CEO peer network of thought leaders to support each other in successes and challenges



Facilitator/Trainer will review the goals of the professional development training and hand out copies of what each CEO completed when they registered. They will be asked to review their expectation and the goals posted – and add or revise it. The trainer will collect them (they will be distributed at the end of day 3 for reflection and review).

Slide 5

## Ground rules

Ground rules

- Safe space - Las Vegas rule
- Speak for yourself
- Diversity of thought and perspective
- Parking Lot

Trainer will review the ground rules list, ask if anyone want to add any other others.

Space space – important that what is said in the 3-day training is confidential

Slide 6

## Areas in Financial Management



Participants will be asked to list the areas in the financial management of a nonprofit  
 Operations, endowment, capital, cash flow, profit and loss (P and L). Review the ability read a financial statement

Slide 7

### Fiscal Management Overview

Type of financial report or system	Describe and purpose & examples
Profit and Loss Statements	
Budget development and management	
Depreciation	
Capital Funds	
Endowment	
Revenue and expense (revenue streams)	
Government funding	
990 and audit (accrual & cash accounting)	

CEO's will be assigned one of these topics (3 CEOs per topic) to research before they attend the professional development training

The CEOs will meet by one of the 6 topic area and share their definitions, and examples

Each group will present their topic and answer the following questions  
 Describe what it is  
 What is the purpose of it – value to the non-profit

See extra training notes in Appendix A for the definitions for the 6 topics.

Slide 8



Review and outline the basics of a business plan and the Revenue VX. Expense, the P and L statement, and the statement of operations.

Slide 9

Financial Scenario's

Financial Scenario 1    Financial Scenario 2    Financial Scenario 3

Divide the participants into 3 groups and share the scenario with each group. Instructions are to review the scenario and develop a plan of action to address the situation. The questions to be answered are at the bottom of the scenario. They pick a scribe and a presenter. Outcome – the presenter will share their scenario and action steps to the other groups and then answers questions from the other 2 groups. Each group has the opportunity to present and answer any questions from the other 2 groups.

The financial scenario's are in the extra trainer materials section of Appendix A.

Slide 10

Financial Scenario Presentations

FINANCIAL SOLUTIONS

Each group will:

The questions to be answered are at the bottom of the scenario. They pick a scribe and a presenter. Outcome – the presenter will share their scenario and action steps to the other groups and then answers questions from the other 2 groups. Each group has the opportunity to present and answer any questions from the other 2 groups.

Slide 11

Questions

Current financial status:    You're not serious!    BE RESPONSIBLE

BUSINESS RISKS    BOARD OF DIRECTORS    Action Steps

Each group will summarize and assess their current financial situation  
 Describe the organizational, business operational, legal, and other risks regarding this situation  
 Discuss at least possible solutions to the situation – Each group will select the strongest solution  
 How will they communicate the financial scenario with their board, which board members have a role (what role would it be)  
 What other key community stakeholders would they need to include for the solution to work (school, elected officials, bank officers, legal counsel, etc. Please be specific).

Prepare a plan for the next year to address the financial challenge – who will lead each step of the plan (CEO, Board chair, CFO, board finance, etc.)

At the end of the 12 months – what would be the change that will have occurred because of these action steps.

Slide 12



Financial Scenario Switch

Financial Scenario 1 – review group 2

Financial Scenario 2 – review group 3

Financial Scenario 3 – review group 1

11

Divide the participants into 3 groups and share the scenario with each group. Instructions are to review the scenarios and develop a plan of action to address the situation. The questions to be answered are at the bottom of the scenario. They pick a scribe and a presenter. Outcome – the presenter will share their scenario and action steps to the other groups and then answers questions from the other 2 groups. Each group has the opportunity to present and answer any questions from the other 2 groups.

What would you add, revise or change to strengthen the plan they developed?  
 Who else would you include and why?  
 How would you communicate the plan to key stakeholders

Slide 13



What changed?

REVISED

REVISED

12

Have each group present what they revised, added and why?

Have the group discuss the learnings when their group reviewed another groups plan – What was the learning and experience?

Slide 14



Welcome

Agenda – Day 2

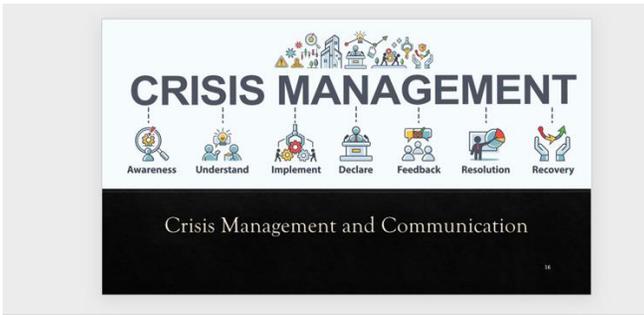
- ◆ Reflections and recap on Day 1 - questions
- ◆ Crisis Management & Communication
- ◆ Wrap up – Day two

13

Trainer will welcome group and summarize Day 1 and ask if there are any question they had?

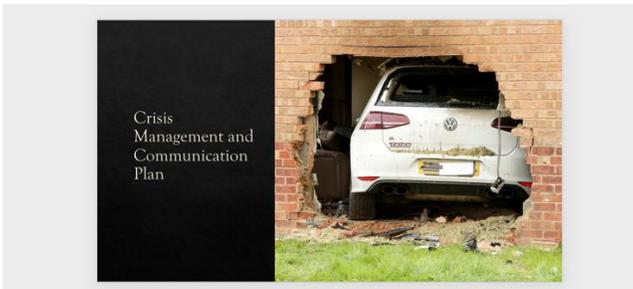
Review Day 2

Slide 15



Ask participants to share a crisis situation, that they addressed/faced. What were the challenges and what did they learn?

Slide 16



Trainer will emphasize that crisis management and a communication plan –in advance are essential. Next section will focus on this topic and how to develop a plan for their nonprofit organization.

Slide 17



There are 24 people in the group. Have pairs of 2 work together to address the crisis and develop a plan.

**12 groups of 2 – work on this for one hour -**

Scenario 1 – 8 people – 4 groups of 2

Scenario 2 – 8 people – 4 groups of 2

Scenario 3 – 8 people – 4 groups of 2

**Next –**

Have all the groups from each scenario sit at a table (Scenario group 1, 2, and 3) combine – share their plan and combine them, strengthening it into one plan to present to the other groups

The three crisis scenario's are located under the extra training materials in Appendix A

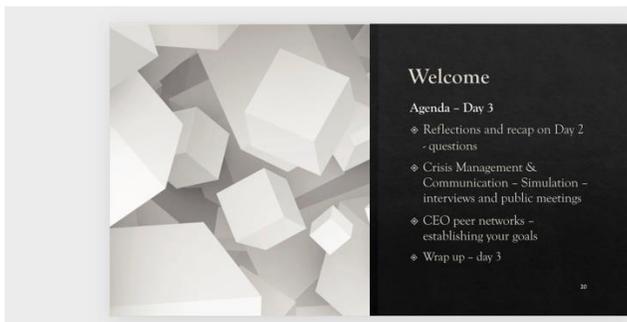
Slide 18



Trainer will ask participants to think about their crisis scenario as homework and be prepared to share strategies and idea for a plan as a group for each scenario.

There is a role play tomorrow – of going through interviews with the press and public meetings. Each of you will have the opportunity to experience it.

Slide 19



Trainer will welcome the group for the final day! Any questions or feedback about Day 1 or 2.

Let's get started.

Slide 20



Simulated interviews

Get into your scenario setting – Each person in the group takes turns being the reporter and the CEO. Each interview should last 2 minutes. Each CEO should have a turn being a CEO and the interviewer.

Report questions are located under extra training materials in Appendix A.

Slide 21



Public Meeting

Each Crisis management Group sits at a table to review the communication plan to share with the public.

Scenario group 1 group goes first, and each CEO will stand up in front of the entire CEO group and summarize a section of the communication plan to the rest of the CEO participants

Each person will take approximately 1-2 minutes.

Scenario group 2 next and 3 follows

Slide 22



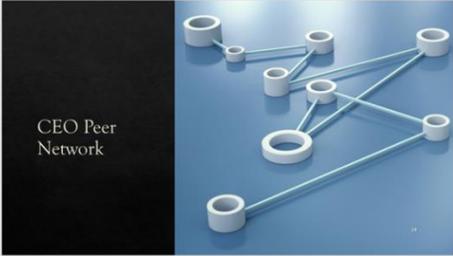
TIME TO REFLECT

Trainer will ask CEO participants.

Share your experience communication the crisis plan to the audience

What did you learn from the experience

Slide 23



CEO Peer Network

CEO Peer network

Trainer will ask for the value of the CEO peer network?

Trainer will have the 3groups that worked in crisis management and communication and have them complete the following questions together

1. How do they want to stay after the completion of the training to support one other (the successes and challenges) in their CEO roles.? Zoom calls, lunches, dinners, retreats?
2. What would support look like? How can this group of CEO support them? Can you describe it?

Slide 24



Trainer will distribute the document the CEOs completed when they registered (and reviewed on Day 1) and ask them to share the following

How were your goals and expectations met?

The goals of the professional training are:

- Increase knowledge in fiscal management
- Create a crisis management and communication plan
- Create a Peer CEO network to each each CEO in their first year in this role.

Slide 25



Complete the training evaluation form located in Appendix A.

Slide 26



Trainer will thank participants and distribute contact information of all the CEO participants.

Slide 27

Extra Trainer notes

## **Fiscal Management Overview**

Slide 7:

### **Definitions – Financial Management**

#### **Profit and Loss Statements**

A profit and loss statement summarizes the finances over 12 months (Zietlow et al., 2018). It is most commonly a calendar year. The P and L, as it is commonly called, show how much money is generated by an organization (Cunningham et al., 2018; Edwards, 2020). It provides the key stakeholders the financial health and position (Zietlow et al., 2018). The statements are usually issued at the close of every month and compare the month and year-to-date financial positions (Worth, 2020).

#### **Budget Development and Management**

Budgets guide the organization in planning for the upcoming fiscal year (Kim & Peng, 2018). Staff develops the budget to calculate the amount of revenue and expected expenditures for 12 months (Edwards, 2020). At the close of each month, the staff reviews the budget compared to actual income and expenses to evaluate how they are doing financially (Zietlow et al., 2018)

#### **Depreciation**

Depreciation is used to calculate the replacement value for large items, such as equipment and boilers, over a specific period (Hall, 2021). It takes the cost of the item and its' expected life to determine a replacement value and an amount the organization should put aside annually (Calabrese & Ely, 2020). For example, if a new boiler is

\$200,000 and the expected life is 20 years, an estimated \$10,000 should be saved annually to replace it. Depreciation is included in the annual audit and calculated by the CPA who completed it (Zietlow et al., 2018)

### **Capital Funds**

Money used for the long-term needs of the business or daily use are called capital funds (Twin, 2020). Examples of uses for these funds are renovation and refurbishment (Ortega-Rodriguez et al., 2020). It can also be used for the construction of a new building, the purchase of property, or the repair of a roof (Zietlow et al., 2018).

### **Endowment**

An endowment typically has cash, and stocks or property, usually resulting in investment revenue (Elmerraj, 2007) based on the performance of the endowment portfolio (Lo et al., 2020). The endowment principle is donated to the nonprofit organization (Witham, 2018) and invested by the board of directors (Dahiya & Yermack, 2018). The committee provides oversight and decides if the investment income is distributed back into the fund or to the organization for operations.

### **Revenue and Expense**

The sustainability of a nonprofit organization is in its revenue and expense. Nonprofit organizations' revenue is generally from donations, membership, and program fees (Zeitlow et al., 2018). The diversification of revenue is very important to the organization's viability (Chang et al., 2018).

Calabrese and Ely (2020) share that nonprofit organizations can have a surplus at the end of the fiscal year and recommend reinvesting it into the organization. It can be used for capital funds, depreciation, or reserved for an unexpected emergency.

Depending on the type of nonprofit organization services offered, expenses are usually 55-60% staffing (Berenguer & Shen, 2018). Many other expenses, such as insurance, occupancy is fixed and need to be closely monitored.

### **Government Funding**

Through an application process, nonprofit organizations have the opportunity to be awarded funds for operations or capital improvements. All levels of government (local, state, and federal) provide a competitive grant process to award funds to offer a specific service, program, or capital improvement for a designated area. The nonprofit organizations use these dollars to provide a service using government dollars (Hung & Hager, 2019). There is a strict and closely monitored accounting system to oversee the expenditure of funds and track the progress of the program awarded.

### **990 and Audit**

Annually, a nonprofit organization must submit 990-tax form (Exempt organizations annual reporting requirements - form 990, part VIII-IX and schedule D [financial information], (n.d.) and audited financials to the Internal Revenue Services to retain its 501 c 3 nonprofit organization status (irs.gov). These 2 forms are completed by an independent CPA (Haas & Giambruno, 1994; Sisaye, 2021). Banks, foundations, and

government funders usually require the 990 and audited financials as part of their annual reporting process.

### **Financial Scenarios**

#### **Financial Scenario 1: Slide 10**

The nonprofit organization has a break-even budget and has had no growth in the past three years. The revenue funding stream is 40% program, 15% fundraising and events, 30% government funding, and 15% registration fees.

<b>REVENUE</b>	<b>BUDGET</b>
PROGRAM	2,000,000
FUNDRAISING	750,000
GOVERNMENT	1,500,000
REGISTRATION	750,000
	5,000,000

Challenge: It is June 30, halfway through your fiscal year. You have learned that you have lost 50% of your government funding. The funding has been eliminated. You need to develop a plan for the new fiscal year to balance the budget. What steps do you need to take and what options do you explore? Who do you include in this process (staff, board, committees other, and why)?

#### **Financial Scenario 2:**

The hot water heater broke in your organization, and it will cost \$250,000 to replace due to permits, building regulations, local code compliance, and plumbing costs.

There is a temporary fix for 30-60 days, but it needs to be repaired within 3 months, so it will not interrupt the programs offered at your organization. There is \$100,000 in reserves and \$50,000 in a line of credit. Your organization is debt free, but

the board of directors does not want to have any debt. How would you address this challenge? What steps do you need to take, and what options do you explore? Who do you include in this process (staff, board, committees other, and why)?

**Financial Scenario 3:**

The minimum wage in your state is increasing by 7% over the next two years. Your organization has a break-even budget, and 60% of your expense is salaries. Forty-five percent of the staff are at the current minimum wage rate, and 25% salaries are at the new rate, so compression of salaries will be a challenge. How would you address this challenge? What steps do you need to take, and what options do you explore to deliver a breakeven budget that includes the new minimum wage and salary compression? Who do you include in this process (staff, board, committees other, and why)? Share all options to consider.

**Crisis Management Scenarios**

**Crisis Management and Communication Plan Scenario 1:**

There is a car that lost control in your parking lot and has badly injured a mother and her child and crashed into your building. What are the steps that you would use in your crisis management and communication plan? How would this crisis be managed and communicated with staff, the board, local authorities, the communities, other participants, and the press? Share all options that should be considered.

Reporter questions

1. What are you going to do to provide a safe parking lot? What changes are you going to make it safer?

2. How are the mother and child?
3. How do you train staff to respond to an emergency?

**Crisis Management and Communication Plan Scenario 2:**

A senior staff member, highly visible in the community, has been arrested for embezzlement of funds, and an article has been published in the local paper. Participants of your organization are upset and asking how the CEO will address it. How would this crisis be managed and communicated with staff, the board, local authorities, the communities, other participants, and the press? Share all the options that need to be considered.

Reporter questions:

1. Why is this person still working in your organization?
2. Have they stolen any money from the organization? If so, how much?
3. What are you going to do about this situation? How can we trust the staff working in this organization?

**Crisis Management and Communication Plan Scenario 3**

Your organization has made the difficult decision to close a branch location of your organization. The programs and services offered are no longer able to sustain the operations. It means closing a daycare center serving forty children, a senior community center, and laying off fifty staff. How would this crisis be managed and communicated with staff, board, local authorities, the communities, other participants, and the press? Share all the options that need to be considered.

Reporter Questions:

1. Why are you closing this center? Is it the only place in our local community to provide childcare
2. Seniors need a place to gather, and there are no options for transportation to other locations.
3. Why did your organization not plan better?

## Appendix B: Electronic Survey (SM)

Insert date

Dear (insert the first name of CEO),

I am completing my Ed. D at Walden University. My capstone project is to understand how nonprofit organization CEOs learn on the job. The confidential email survey is intended to collect data that will provide information about your learning experiences as a CEO. It will be summarized, and no identifying information will be shared or disclosed. I hope that you can take the time to complete the anonymous survey to share your perspective and experiences. Your participation would be very appreciated, and by completing the survey, you give consent to participate in the study. It is completely voluntary. You can withdraw your participation at any time.

### **Survey:**

1. How long have you been in the role of CEO at this nonprofit organization?
2. What do you believe the main successes in your position as CEO have been?
3. Please share the main challenges in your position as CEO.
4. In thinking about your challenges, what was your takeaway learning?
5. Can you share professional development workshop or training you would recommend? Please describe.
6. Can you share a challenge the organization faced when you were CEO?
7. Please describe. What was your takeaway learning from the experience?
8. Is there a PDT or workshop that you wished you could have taken in advance of this situation? If so, what was it and why?

9. Have you received any professional development for your role as CEO? If so, can you name the trainings and describe the content covered?
10. Was it helpful or beneficial? Why or why not?
11. What trainings would you have added, changed, or eliminated when looking back now on your role as CEO?
12. What kind of training or workshops do you suggest being offered to CEOs that are not available?
13. Can you describe an on-the-job learning experience in your role as a nonprofit organization CEO?
14. Who do you go to when you need to learn a job performance task as CEO?  
Please describe (board, community, partner, colleague).
15. Can you share an example of something you needed to learn as the CEO?  
How did you go about learning it? What tools and resources did you use?  
What people resources did you use?
16. Is there anything else that you would like to share?

Thanks very much for completing this survey!

## Appendix C: Thank You Letter

Dear (enter name of participant),

Thank you for participating in the interview and sharing your experiences as a nonprofit organization CEO. Your thoughts, perspective, and insights are of immense value to this project.

Enclosed is the transcript of your interview. Please review it and confirm that it reflects the answers you shared during our conversation. After reviewing it, if you find it does reflect your perspective or if some information is missing, please feel free to add comments to the bottom of the transcript. It is essential to capture your thoughts, and our interview is accurately recorded and reflects what was discussed.

Please return your transcript with any corrections or edits within one week of this letter.

Once submitted, please delete, and destroy it after you have sent the comments to me. If you have any questions, please contact me at XXX-XXX-XXXX or

[xxxxxxx@waldenu.edu](mailto:xxxxxxx@waldenu.edu).

Sincerely,

Julie Gallanty

Doctoral Candidate

#### Appendix D: Email to Interview Participants

Dear (insert the first name of CEO),

I am completing my Ed. D at Walden University. My capstone project is to understand how nonprofit organization CEOs learn on the job. I want to set up a time to meet with you for about 60 minutes on Zoom or Skype to ask questions about your on-the-job learning in your role as a CEO.

Participation in the study is confidential and your identity will be protected. It will be summarized, and no identifying information will be shared or disclosed.

I hope that you can take the time to complete the anonymous survey to share your perspective and experiences. Your participation would be very appreciated, and by completing it, it is entirely voluntary. You can withdraw your participation at any time.

I thank you in advance for your consideration. My contact information is [xxxxxxxx@waldenu.edu](mailto:xxxxxxxx@waldenu.edu).

Warm regards,

Julie Gallanty

## Appendix E: Confidentiality Agreement

Project title – Nonprofit Organization CEOs learned skills and strategies needed for their leadership position

IRB # \_\_\_\_\_

I, \_\_\_\_\_ the \_\_\_\_\_ (specific job description, e.g., interpreter/translator)

I understand and agree to

1. Keep all the research information shared with me confidential by not discussing or sharing the research information in any form or format (e.g., disks, tapes, transcripts) with anyone other than the *Researcher(s)*.
2. Keep all research information in any form or format (e.g., disks, tapes, transcripts) secure while it is in my possession.
3. Return all research information in any form or format (e.g., disks, tapes, transcripts) to the *Researcher(s)* when I have completed the research tasks.
4. After consulting with the *Researcher(s)*, erase or destroy all research information in any form or format regarding this research project that is not returnable to the *Researcher(s)* (e.g., information stored on a computer hard drive).
5. Other (specify).

\_\_\_\_\_  
(Print Name)  
*Researcher(s)*

\_\_\_\_\_  
(Signature)

\_\_\_\_\_  
(Date)

\_\_\_\_\_  
(Print Name)

\_\_\_\_\_  
(Signature)

\_\_\_\_\_  
(Date)

For questions regarding participant rights and ethical conduct of research, contact the Research Ethics Office at Walden University at [irb@waldenu.edu](mailto:irb@waldenu.edu)

## Appendix F: Interview Guide and Protocol

Thank the participant for agreeing to the face-to-face meeting.

- Review the informed consent, disclose the use of the digital recorder to make sure to capture the discussion and the use of a notepad to take notes as we talk.
- Remind the interviewee that they can stop participating at any time for any reason.
- Follow up with any new questions relevant to the study.
- End the interview and discuss member checking with the participant.

Survey:

- **Neutral Question:** Can you share how you started in the role as CEO at this nonprofit organization? Where did you previously work (warm-up question)

(RQ 1) How do CEOs in Green Organization describe their job learning experience as a nonprofit CEO?

- What do you believe the main successes in your position as CEO have been?
- Please share the main challenges in your position as CEO.

(RQ 2) What professional development opportunities do nonprofit organization CEOs consider most important in helping them meet job expectations?

- Can you share professional development workshop or training you would recommend? Please describe.
- Have you received any professional development for your role as CEO? If so, can you name the trainings and describe the content covered?
- Was it helpful or beneficial? Why or why not?

- In thinking about your challenges, what was your takeaway learning?
- Can you share a challenge the organization faced when you were CEO?

(RQ 3) What tools and resources would the CEO suggest using to support their learning?

- Please describe. What was your takeaway learning from the experience?
- Is there a PDT or workshop that you wished you could have taken in advance of this situation? If so, what was it and why?
- What trainings would you have added, changed, or eliminated when looking back now on your role as CEO?
- What kind of training or workshops do you suggest being offered to CEOs that are not available?
- Can you describe an on-the-job learning experience in your role as a nonprofit CEO?
- Who do you go to when you need to learn a job performance task as CEO? Please describe (board, community, partner, colleague).
- Can you share an example of something you needed to learn as the CEO? How did you go about learning it? What tools and resources did you use? What people resources did you use?
- Is there anything else that you would like to share?

Thank the participant for their part in the study.

Confirm their contact information for follow-up questions. Confirm that a transcript of the interview will be sent for them to review.