2023

Strategies for Diverse Membership Recruitment and Retention in Nonprofit Organizations

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This is to certify that the doctoral study by

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has been found to be complete and satisfactory in all respects,
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2023

Abstract

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MS, Walden University, 2019

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Consulting Capstone Study Submitted in Partial Fulfillment

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Abstract

Incorporating diversity is essential to the survival of nonprofit organizations. This qualitative single case study was important to membership-based nonprofit organization leaders because recruitment and retention strategies contribute to organizational diversity. Grounded in critical multicultural marketing theory, the study was conducted to explore the strategies that nonprofit organization leaders used to recruit and retain a diversified membership. Data were collected from three participants, who were nonprofit organization leaders in the eastern United States, through semistructured interviews, and review of organizational documents and reports, social media, and internet reports. The data were thematically analyzed and two themes emerged: (a) recognition and understanding and (b) marketing strategies that diversify membership. A key recommendation was for membership-based nonprofit organization leaders to focus their marketing strategies on community-driven interests, such as the growing wealth gap and discrimination in the workplace, rather than specific organizational interests. The implications for positive social change include an increased sense of belonging for the people served by organizations, the creation of more equitable outcomes for the nonprofit organization and increased organizational diversity to represent the communities the organization services and supports.

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Dedication

I dedicate this project to my daughter, Ahleeyah Smith, whom I love dearly. Ahleeyah, I hope my dedication to this work has made you proud and can serve as a source of inspiration for you—always be the best version of yourself.

Next, I dedicate this project to the land of my birth – Saint Vincent and the Grenadines. My upbringing on this small island molded me into who I am today.

Finally, I dedicate this project to myself: to be a source of inspiration as I continue pursuing success for nonprofit organizations.

Acknowledgments

First, I would like to thank God for keeping me through this journey. Even when I didn't feel motivated to continue, He was there. God's abundant grace was necessary for my getting this far.

I would like to thank my chair, Dr. Rocky Dwyer, and my doctoral study committee for working with me through this process and helping me put my best foot forward.

I would like to thank Dr. Aaron Graham, Sr., my partner, my love, and my Superman, for providing a shoulder to cry on when I was frustrated and for putting on his professor hat to read and suggest edits to my study—even when he had "stuff" going on.

I would like to thank my daughter, Ahleeyah Smith, for understanding that I needed time to work through my study and for recognizing and taking pride in my achievements.

I would like to thank my parents, Gerald and Anette Charles, and the entirety of my immediate and extended family. Thank you for understanding that I had to dedicate my time to completing my research study. I know that you are proud of this accomplishment.

Finally, I would like to thank my undergraduate professors at West Virginia State University: Dr. Timothy Alderman, Dr. Robert Wallace, Dr. Frank Vaughan, and the many others that influenced my life. They always believed that I could do great things and became like family to me.

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Section 1: Foundation of the Study

As a scholar consultant and the primary researcher, following Walden University's Doctor of Business Administration (DBA) consulting capstone requirements and using the 2019–2020 Baldrige Excellence Framework (Baldrige Performance Excellence Program, 2019) as a guide, in this study I explored the strategies that nonprofit organization leaders use to recruit and retain diverse members by working closely with the client organization (referred to by the pseudonym, LMN).

Background of the Problem

Diversity is a benefit for organizational leaders who seek to improve their organizational outcomes and performance (Mason, 2020). Although nonprofit organizational leaders attempt to implement diversity strategies, they struggle to implement diversity strategies that include the entire organization (Jurcevic & Fyall, 2020). Although nonprofit organizational leaders can address the diversification of their board and their staff, diversity among nonprofit organizations should reflect beyond the executive leadership team and include members of the community at large (Mason, 2020). Because nonprofit organizations represent the communities they serve, nonprofit organizations dependent on memberships from those communities struggle to recruit and retain a diversified membership (Mason, 2020). Failure to have the nonprofit organization represent the communities that it serves could result in distrust of the organization, which can further impact the recruitment and retention of diverse members (Andrasik & Mead, 2019). Nonprofit organizations that legitimately represent the populations or communities that they serve develop trust among that population

(Andrasik & Mead, 2019). Thus, developing trust among the communities they serve would guide organizational leaders to develop strategic ways to recruit and retain diverse members from those communities.

Problem Statement

Like for-profit organizations, diversity, equity, and inclusion in nonprofit organizations are linked to improved performance and organizational outcomes (Mason, 2020, p. 22). According to a survey conducted by NonprofitHR (2019), 43% of nonprofit organizations' staff diversity composition does not reflect the community the organizations serve. The general business problem was that some nonprofit organization leaders lack diversified membership strategies to ensure members represent the communities the organizations serve. The specific business problem was that some nonprofit organization leaders lack strategies to recruit and retain a diversified membership.

Purpose Statement

The purpose of this qualitative, single case study was to explore the strategies that nonprofit organization leaders use to recruit and retain a diverse membership. Participants for this study were part of the leadership team of a nonprofit organization located in the eastern region of the United States who attempted to develop and implement strategies to recruit and retain a diverse membership for their organization. The implications for positive social change may be enhanced by increasing cultural diversity beyond the leadership of the organization. This would increase the understanding of the community where the nonprofit organization serves.

Nature of the Study

There are three research methodologies: quantitative, qualitative, and mixed methods (Taguchi, 2018). I chose to use the qualitative methodology to explore the organizational leaders' recruitment and retention strategies and their correlation to the diversity of organizational membership in this study. The qualitative research methodology enables researchers to explore and understand individuals' lived experiences (Yin, 2018). Because a quantitative researcher focuses on data sets and interprets the variability in different points of data, this methodology was not relevant to the current study (see Taguchi, 2018). The current study was centered on the qualitative reporting of individuals concerning strategies and barriers to cultural inclusion, diversity, and representation in nonprofit organizations, and this manner of analysis did not lend itself to numerical representation. As Taguchi (2018) noted, a mixed-method approach uses both quantitative and qualitative elements to examine and explore the research problem, and because I did not examine relationships between variables, a mixed-method approach was not an appropriate methodology for this study.

I employed the single case study design in this study. A researcher conducts a single case study to critically explore and analyze the current circumstances within a case (Yin, 2018). A rationale for selecting the single case study design instead of the multiple case study design is that the single case study design allows the researcher to test a consequential theory (Yin, 2018). A multiple case study design can be impractical due to the possibility of inconsistency across each case, which may invalidate the findings of the results (Yin, 2018). Other qualitative designs may include phenomenological and ethnographic designs. Researchers use phenomenology to explore the meaning behind participants' experiences (Dodgson, 2017); therefore, this approach was not appropriate for the current study. An ethnographic design is not individualized but allows the researcher to observe the participants through the patterns within a given population (Dodgson, 2017). The techniques of finding the patterns within a given population were not relevant to the current study.

Research Question

What strategies do nonprofit organization leaders use to recruit and retain a diversified membership?

Interview Questions

1. What challenges do you experience when recruiting a diverse membership?
2. What strategies do you use to diversify membership?
3. Of those strategies, which were most effective, and why?
4. Of those strategies, which were least effective, and why?
5. How will you assess organizational diversified membership?
6. How do you assess or evaluate the effectiveness of your recruitment and retention strategies to attain the desired outcomes?
7. Do you have any other information that you would like to share regarding your strategies to recruit and retain diverse members?

Conceptual Framework

The conceptual framework used for this doctoral study was Burton's (2002) critical multicultural marketing theory (CMMT). Burton explained that the tenets of the theory came from the need to explore power, privilege, the hierarchy of oppression, and resistance among ethnic groups to demystify multicultural categories, question the fallacy of monolithic identity, and interrogate Whiteness. Nonprofit organizations, especially member seeking organizations, search for ways to attract diverse members to represent their organization within the community. Demangeot et al. (2015) aided Burton's theory by emphasizing the need for organizational leaders to tailor their marketing products and strategies to specific ethnicities or groups.

CMMT provided the conceptual lens for this study. This conceptual framework allowed me to consider the organizations' recruitment, retention, and growth goals in light of the specific cultural composition of the communities they serve. A potential benefit of using CMMT was that it highlighted the need for organizational representation, which was an approach suggested by Lee (2019). When organizational leaders implement CMMT, it may lead to an open awareness within the nonprofit organization to seek organizational representation from within the communities it serves, which aligns with Lee's findings. Having organizational representation may allow nonprofit organization leaders to foster positive organizational performance while attaining their operational missions to support community members.

Operational Definitions

Diversity initiatives: The policies and procedures that organizational leaders adopt and implement to improve the experiences of disadvantaged groups within the community (Leslie, 2019).

Diverse membership: The inclusion of members within an organization with different backgrounds and viewpoints that enables the organization's leadership to have a broad understanding of the community they serve, its problems, and how to engage community members to identify solutions (Carethers et al., 2019).

Fundraiser event: An event used to fundraise is the art of raising money through different techniques, and fundraiser events facilitate fundraiser growth within an organization (Maqbool et al., 2019). A fundraiser event is a technique that includes required advertisement and promotion leading up to the actual event (Maqbool et al., 2019).

Marketing strategies: Practices that influence the behavior of volunteers or donors when used effectively (Gross & Rottler, 2019).

Members: Paying dues is a requirement of becoming a member of a membership-based organization (Oliver et al., 2023). In this study, members are the due-paying individuals.

Membership-based organizations: An organization that uses a membership model to attract individuals to join the organization in support of its mission, vision, and values that depend on community members (Misener et al., 2020).

Membership recruitment drives: The act or process of expanding an organization's membership to support the vision and mission of the organization (Style et al., 2020).

Multiculturalism: The uniformness and adoption of culture, which also involves political protection of rights of underrepresented groups and all aspects of diversity (Molina & Rodríguez-García, 2018).

Recruitment marketing: The process of using marketing strategies to attract and retain exceptional talent for an organization (Alashmawy & Yazdanifard, 2019).

Sameness: The point of eradication of variations (Bredewold, 2021).

Assumptions, Limitations, and Delimitations

When researchers undertake research, it is necessary to identify the assumptions, limitations, and delimitations that may affect their study because doing so will enable them to implement strategic measures to mitigate those challenges (see Theofandis & Fountouki, 2018).

Assumptions

Unproven beliefs or ideas are the assumptions specific to a study (Schoenung & Dikova, 2016). In this study, I made three assumptions. The first assumption was that the nonprofit organization would benefit from having a diversified membership. The second assumption was that the client leader and executive board members would honestly respond to the interview questions. The third assumption was that the client leader would provide the necessary documentation, including financial, board meeting minutes, and strategic plans, for review and analysis.

Limitations

Limitations are potential shortcomings or weaknesses in the research (Theofanidis & Fountouki, 2018). The limitations of this study included the COVID-19 pandemic, which may have affected the availability of participants for an interview and the data collection process due to the possibility of insecure server platforms related to connectivity issues and participant's knowledge of the server platform's usage.

A second limitation was that the experiences shared by the leadership of a single nonprofit organization in the eastern region of the United States may limit the generalizability of the study because there were no other nonprofit organizations included in the study with which to compare data. Thus, the information obtained may not provide a clear view of what similar nonprofit organizations with limited employees experience.

Delimitations

Delimitations are the boundaries and limits set by the researcher (Theofanidis & Fountouki, 2018). In this study, the first delimitation was that the participants involved in the study were comprised of only three leadership team members of the nonprofit organization. The second delimitation was that the nonprofit organization was focused on historic preservation, which may present restrictions to identifying organizational membership recruitment and retention beyond the organization's stated mission.

Significance of the Study

Contribution to Business Practice

In this study, I incorporated elements outlined by Rust (2020) that contributed to effective business practices. Among socioeconomic trends, marketers found that diversity and inclusion, discrimination, and wealth inequality are common themes that guide strategies of organizational leaders (Rust, 2020). When organizational leaders invest in diversity and inclusion, members and potential members can determine that such organizations encourage egalitarian values, which connect with valuing workplace fairness (Madera et al., 2016). Diversity in an organization's workplace encourages knowledge sharing, which gives organizational leaders a variety of perspectives that could contribute to establishing best business practices and encourage competitive advantages (Azeem et al., 2021).

Implications for Social Change

Incorporating the findings of this single case qualitative study could contribute to positive social change for nonprofit organization leaders and the communities that they serve. Increasing stakeholder diversity could influence how nonprofit organization leaders structure their programs and services, which are crucial components for serving the most underserved populations (Bopp & Voida, 2020). Internal stakeholders are the staff and volunteers, and external stakeholders are the members and donors. Organizations that are dependent on membership can address the need for diversity of their members by incorporating the findings of this single case qualitative study that provide strategies used by membership-based nonprofit organization leaders to achieve the diversification of their membership. Improving the diversification of membership in membership-based nonprofit organizations would allow the organization to represent the community that the organization serves.

A Review of the Professional and Academic Literature

The purpose of this qualitative single case study was to explore the strategies that nonprofit organization leaders use to recruit and retain a diverse membership. In the literature review, I analyzed research that had been published in a 5-year time frame to better understand the research topic. My work can benefit both for-profit and nonprofit leaders who make informed decisions within their organization to improve diversity in membership recruitment and retention.

The conceptual lens for this was the CMMT. In CMMT, Burton (2002) stated that there was no individualized sense of self when marketing to groups. Rather, homogeneity played a role in marketing strategies. Burton further identified the need for data collection and research from different groups, highlighting that some groups lack representation during the data collection and analysis period. Burton noted that during marketing strategy development, the creation of culture plays a crucial role. The commonality among people of the same culture surpasses their current location, contributing to consumer behavior analysis (Burton, 2002). Burton connected critical theory, which addresses race and Whiteness, and CMMT, which includes the need for culture-specific marketing strategies. Researchers have used CMMT to help leaders of membership-based organizations and other organizational leaders effectively develop strategies to recruit and retain diverse members. Effectively recruiting and retaining diverse members enhances the representation of nonprofit organizations in their communities, further strengthening the trust between the population and the organization and enabling an easier way of serving the community (Andrasik & Mead, 2019).

Process for Gathering Information

I used the following keyword terms and phrases to conduct a search of the literature: *critical multicultural marketing theory (CMMT)*, *membership recruitment, membership retention, diversity,* and *diverse marketing strategies*. The search results included books, non-peer-reviewed articles, peer-reviewed articles, journal articles, articles published within the designated 5-year range, and articles published outside the designated 5-year range. I primarily used Walden University Library and Google Scholar to find literature. Specific research databases searched included SAGE Journals, EBSCOHost, Scholar Works, and ProQuest, which I used to obtain literary sources, such as books, peer-reviewed articles and journals, and websites. Walden University's DBA program recommended that 85% of the referenced academic sources have a publication date within the past 5 years, contributing to the academic argument's currency and relevancy (Walden University, 2023). Most of the sources that I used in the literature review were peer-reviewed articles, and most of the referenced academic sources in this study were published between 2018 and 2023. The literature review also included academic books, dissertations, and data articles (see Table 1).

Table 1

Literature Review Content

Literature review content	Total #	# between 2018–2023	% total between 2018–2023	# outside of 2018–2023
Books	2	2	100%	0
Peer-reviewed articles	147	135	92%	12
Non-peer-reviewed articles	22	21	95%	1
Dissertation	1	1	100%	0
Government/corporation	6	6	100%	0
Total sources	178	165	93%	13

I used this research's purpose statement to guide the structure of the literature review. I used the information found in the literature review to understand and answer the research question and provide effective strategies for membership-based nonprofit organization leaders to improve their recruitment and retention efforts. The target population for this study consisted of three leadership team members of a nonprofit organization. The leadership team worked together to recruit new and more diverse members and retain their current members. The organization was dependent on the members that join and stay with the organization. The study's implications for positive social change included the potential to provide positive outcomes for nonprofit organization leaders who depend on members for the organization's sustainability. Nonprofit organization leaders must adjust how they recruit and retain members, especially when ensuring their membership pool is more diverse, and this was the primary challenge I faced in my consulting client capstone. During the project, I consulted with a membership-based nonprofit that has historically served a predominantly White community. However, in recent years, the geographically bound community it serves as part of its fundamental mission had significantly diversified. Thus, my primary role in working with the client organization consisted of providing insight to the client organization leaders for recruitment and retention of the new demographic without alienating its traditional members or significantly altering its fundamental mission.

Membership-Based Nonprofit Organizations

When attempting to understand the importance of diversity recruitment and retention of members in nonprofit organizations, it is important to understand the classification of a membership-based nonprofit organization. Some nonprofit organization leaders focus on recruiting and retaining diverse board members, volunteers, and staff members (Mason, 2020). Some organizations depend on the members who pay dues to be a part of the organization. Organizations, such as Girl Scouts, Boy Scouts, and the Young Men's Christian Association (YMCA) depend heavily on memberships (see Grothe-Hammer & LaCour, 2020). For some nonprofit organizations, members are integral to the organization's maintenance and contribute informally to the organization's development of processes and procedures (Grothe-Hammer & LaCour, 2020). Some nonprofit organizations base their programming, policies, and processes on the composition of their members (see Grothe-Hammer & LaCour, 2020). Some nonprofit organizations also hire specific individuals to recruit members into their organization, understanding that a low return on membership recruitment may affect the overall financial capabilities of the organization (Oursler, 2020). Khan (2018) outlined an important aspect of membership-based nonprofit organizations, stating that some membership-based nonprofit organizations have seen a decline in membership due to losing interest in signing up for a specific organization; instead, donating to a specific cause seems more applicable and appropriate for individuals. The COVID-19 pandemic contributed to the decline in membership where nonprofit organizations that usually meet for specific interests, such as sports clubs, had to refrain from in-person activities over 2 years (Feiler & Breuer, 2021). These restrictions on in-person meetings dovetailed with existing challenges facing nonprofit organization leaders' difficulties retaining and recruiting a diverse membership.

Along with the problem of a decline in membership dues and the challenges related to the COVID-19 pandemic, nonprofit organizations struggled to recruit and retain a diverse audience (Yukich et al., 2019). The COVID-19 pandemic increased the difficulty for nonprofit organization leaders to recruit and retain members and affected the financial viability of nonprofit organizations (Broder, 2019). According to Garst et al. (2021), youth-serving organizations restructured their operations during the pandemic, with some nonprofit organization leaders adjusting operations to keep them operating at some capacity. The struggle for membership-based nonprofit organization leaders prompted them to look at strategies to retain existing members and recruit new members in a changing environment. Mahmud et al. (2021) highlighted people's concerns during the pandemic and the fear and uncertainty that many faced, saying that some individuals remain unsure about their financial status, despite vaccines. Some individuals unsure of their health status fear the possibility of losing their lives or the lives of their loved ones. There was much concern from potential and current stakeholders because they did not want to engage with the public (Broder, 2019). Nonprofit organization leaders realized that they had to strategically continue to execute their mission, vision, and values but with consideration of the current crisis (Raeymaeckers & Van Puyvelde, 2021). The challenges posed by COVID-19 consumed much of nonprofit organization leaders' attention and other efforts, such as diversity retention and recruiting efforts, took a back seat.

Nonprofit organization leaders had to develop alternate ways of executing their mission while practicing social distancing and following the COVID-19 protocols. Some nonprofit organizations closed their doors and no longer held in-person activities (see Raeymaeckers & Van Puyvelde, 2021). Many nonprofit organizations, including member-based organizations, became dependent on the internet to continue their services (Raeymaeckers & Van Puyvelde, 2021). Some membership-based nonprofit organizations struggled with using the internet to continue their services during the COVID-19 pandemic (see Raeymaeckers & Van Puyvelde, 2021).

Some members of diverse groups experienced uncertainty and fear during the COVID-19 pandemic, which negatively impacted the ability of membership-based nonprofit organizations to develop strategies to request their membership. Jaklevic (2020) stated that the high numbers of COVID-19 victims were from underrepresented communities. Jaklevic further highlighted the struggle to recruit underrepresented groups for vaccine trials. Diverse groups, such as people of color, including Blacks and Hispanics, older people, and the lesbian, gay, bisexual, transgender, queer/questioning, intersex, asexual, and other (LGBTQIA+) communities, experienced additional struggles during the uncertain times of the COVID-19 pandemic.

In addition to the COVID-19 pandemic, nonprofit organization leaders struggle with membership. Membership-based nonprofit organization leaders struggle to fully comprehend how diversity works and its application to recruitment and retention (Yukich et al., 2019). Membership-based organization leaders seek to recruit individuals with similar interests who believe in the cause, mission, and vision of the organization (see Oursler, 2020). Because recruitment and retention of members to membership-based nonprofit organizations are important, effective recruitment and retention strategies could benefit membership-based organizations (Oursler, 2020). Because membership based nonprofit organizations largely rely on public events to promote awareness of their mission and make contact with diverse populations they have not traditionally served, the pandemic’s disproportionate effect on underrepresented groups created additional barriers to the diversification of membership.

Diversity in Member Recruitment and Retention

Before understanding diverse recruitment and retention strategies, organization leaders should understand how marketing contributes to effective recruitment and retention strategies. Burton (2002) emphasized the need to avoid *sameness* among different diverse groups when attempting to market products or services to specific diverse populations. Marketing, recruitment, and retention work together simultaneously, so it is important to include marketing as part of recruitment strategies developed due to the competitiveness and complexities involved in finding the right human force (Alashmawy & Yazdanifard, 2019). The term *recruitment marketing*, which highlights the approach of organizational leaders incorporating different skills and strategies in a highly competitive environment, could be an effective approach for nonprofit organization leaders to address recruitment and retention (Alashmawy & Yazdanifard, 2019). Nonprofit organization leaders can use the internet as part of their marketing strategy (Campbell & Lambright, 2019). Organization leaders using the internet's full capacity can effectively market to their target audience, which extends to the proper use of social media (Campbell & Lambright, 2019). The ability to effectively communicate or interact with an organization's target audience can benefit the organization's long-term goal of recruiting new members or retaining current members (Campbell & Lambright, 2019). Organization leaders who use marketing strategies in their recruitment efforts could enhance their ability to establish and develop strong relationships with their target audience, improve their brand image, and promote a positive reflection of the brand's promise (Alashmawy & Yazdanifard, 2019).

Membership recruitment and retention shows a greater importance for membership-based nonprofit organization leaders that are dependent on the general public as a financial source. Nonprofit organization leaders who are dependent on membership should also consider having a dedicated outreach team (Woo & Myers, 2020). Prioritizing the outreach portion of the organization entails crafting messages that encourage the target audience to desire and seek membership within the organization (Woo & Myers, 2020). The dedicated outreach team should be knowledgeable about the composition of the current members and the community and develop effective marketing strategies to build on diverse recruitment and retention.

Nonprofit organization leaders may struggle with recruiting and retaining the diverse members they need for their organization to represent the communities they serve. Thus, the necessity for the development of organization leaders' ability to understand members or membership as well as the types of members and memberships that they seek. Because of the diverse nature of people, nonprofit organization leaders should be able to identify different characteristics about their current members and have an idea of the members that they seek for membership (Ganesh et al., 2022). Nonprofit organization leaders need to identify their own engagement drivers and assess how their engagement drivers align with the people that they are trying to reach (Ganesh et al., 2022). People have different reasons for joining an organization, and thus nonprofit organization leaders should ensure that they are attracting the people that they really want to represent their organization's mission, vision, and values. Organization leaders should seek to also understand the different member types, membership types, and the characteristics of the community in which the organization serves (Ganesh et al., 2022). A clear understanding of the organization's mission, vision, and values, which aligns with an understanding of the organization's current members and the potential members from the community, could strengthen organization leaders' approaches to membership recruitment and retention.

Organization leaders with a good understanding of their community can reap benefits when attempting to recruit and retain diverse members. Understanding the community that the organization serves will provide an opportunity for organization leaders to identify diverse groups and put effort into addressing these groups. Addressing diverse groups would mean that recruitment and retention strategies would be tailored to the diverse communities and organization leaders should consider the current diverse population when developing strategic marketing plans for diverse membership recruitment and retention (Abu Farha et al., 2019). It is essential that organization leaders that are seeking to recruit and retain diverse members consider the requirements for a tailored marketing approach that will effectively market to diverse groups (Burton, 2002). The need to strategically apply diverse marketing techniques did not present itself until the increase in movement of people, migration and immigration, and the addition of different diverse groups, such as the LGBTQIA+ community, prompted marketers to address this approach (Burton, 2002). Organization leaders benefit from having a diverse membership base, and building a bond or relationship with different people, which further decreases misconceptions, is a crucial contributor to diversity in organizations (Andrasik & Mead, 2019). In other words, building a diverse membership base could help the organization leaders understand its community.

The ability to provide convincing information about a nonprofit organization's mission, vision, and values could determine the people that nonprofit organization leaders attract to their organization, whether as donors, volunteers, staff, or even members. Organization leaders should consider the potential risks when incorporating marketing strategies that encourage a diverse audience, such as implicit bias and the integration of societal stereotypes (Dossett et al., 2019). Walker (2019) reported that organization leaders should be mindful of how they address diverse recruitment. The efforts of the organization leaders should not be to increase misconceptions but to create a space for learning and understanding. Organization leaders who begin diverse recruitment strategies without understanding diversity's key concepts can set themselves up for failure.

Multiculturalism and Marketing

When addressing diversity and diversified communities, conveying a compelling message to the target audience can determine the message's effectiveness. The message's effectiveness depends on how the target audience responds to the message. Song et al. (2018) emphasized the need for marketing messages to have a connecting catalyst to the intended audience's culture. A connecting catalyst contributes to the individualized marketing approach as noted by Burton (2002). Song et al. also determined the need for decoding the catalyst involved, which means decoding the message, the medium, and the method when attempting to reach a diverse audience. Davis (2018) added to this notion by outlining that race and racism come into play when analyzing the catalyst involved. When organization leaders and marketers direct their attention to the cultural aspects of the diverse groups within their organization and community, develop an understanding of different cultural aspects, and are openly willing to learn about the diverse groups and their cultures instead of making assumptions based on race, the presence of racial discrimination decreases (Plaut et al., 2018).

Nonprofit organization leaders should recognize the aspects of multiculturalism and employ marketing strategies that highlight the aspects of multiculturalism within their community. Burton (2002) defined the variations in multiculturalism and further highlighted how each variation contributed to marketing strategy, including conservative, liberal, pluralist, commercial, corporate, and critical. Burton's approach addresses the views of different theorists, most of which connected critical theory to critical multiculturalism and its marketing approach. The notion of individual identities and the application of individualism, especially within the context of culture, was part of the argument that Burton presented when approaching the idea of multiculturalism and its application to marketing to diverse populations. Grier (2020) found that the challenge was misunderstanding the culture and the individual. The need for a firm understanding of characteristics associated with diverse groups before marketing to diverse groups will help marketers understand and devise an approach (Grier, 2020). Grier further added that the difference in societal groups, the levels of experiences, and the different lifestyles are approaches to understanding the variations in diverse groups. Organization leaders and marketers could address multiculturalism and marketing by adhering to attributes of socially responsible marketing such as supporting measures that could ameliorate the issues associated with diverse groups in their community and using their skills to advocate for positive changes (Kennedy & Smith, 2022). These supporting measures could be best implemented by tending to the specific needs and concerns of diverse groups within their respective communities.

If marketing experts and nonprofit organizational leaders wish to address the concerns of specific groups, they should better address those groups' experiences. It would allow marketers and nonprofit organization leaders to consider some of the societal challenges of some people and tailor their marketing campaigns to address and understand those concerns sensitively. The characteristics of individuals can be stigmatizing and, therefore, present problems for marketing experts and organization leaders wishing to reach such individuals with their marketing techniques (Harmeling et al., 2021). Marketing experts and organization leaders should be mindful of crafting communicative messages to avoid the potentiality of individuals that fall within the stigmatized categories experiencing feelings of devaluation (Harmeling et al., 2021). Harmeling et al.'s (2021) research confirmed Burton's (2002) idea that the downfall for marketing experts or organizational leaders attempting to utilize marketing is the incorporation of homogeneity of cultural groups. Burton argued for the need to understand and address cultural groups and their breakdown. As Harmeling et al. addressed the idea of stigmatized groups, critical marketing theorists, according to Burton, would not encourage the use of stereotypes or stereotypical language to depict marketing strategies for reaching a diverse audience. Burton, instead, professed that the proper investigation of diverse groups under different criteria would encourage a better understanding. This would, in turn, contribute to their approach when crafting effective marketing strategies. Burton further broke down the idea of stereotypes and stigma when addressing the emergence of biracial ethnic identities. Harmeling et al. highlighted the stigma associated with mixed or biracial groups, which led Burton to encourage marketing experts and organization leaders to learn about the upcoming group and incorporate such groups into the marketing strategy.

Diversity within the population of the United States has sharply increased in in recent years. Thus, organizational leaders and marketers must adapt their strategies to meet the needs of this shifting population. There are different diverse group categories emerging and organization leaders and marketers should be aware of the different groups, especially common ones. One example of a prevalent diverse group are younger people. Sahagun (2019) highlighted the shift to a younger more diverse audience, which should prompt organization leaders to update their current marketing or business strategy, since individuals may belong to multiple groups. For example, there may be an individual who was born in South America, is Black, and is also part of the LGBTQIA+ community. Nonprofit organization leaders are not exempt from the current and future changes of the demographic composition of its population. Nonprofit organization leaders should put every effort into strategizing so that they have a competitive advantage in the industry. Nonprofit organization leaders should understand that their attention to the diverse population could aid their attempt to obtain funding and create programs that align with the communities that they serve.

There is stress on nonprofit organization leaders to know and understand the communities that they currently serve and the communities that they can serve in the future, which adds to the organization's relevancy. As Sahagun (2019) theorized, a lapse in the adaptation to the changes in the composition of the population, may present a struggle and a stagnant organizational outlook. Dey et al. (2019) added to the concept of the changing composition of the population and the need for organizations to adapt to the changes. Dey et al. further confirmed that organizational leaders should engage in research to understand multiethnic groups, because of the heterogeneous approach that globalization created. A heterogeneous approach to marketing to a multicultural or multi-ethnic audience may not always work well for organizational leaders. Burton (2002) confirmed this notion by addressing the importance of individualizing the marketing strategy or even further understanding the subgroups. Dey et al. looked further at addressing the multiethnic and multicultural communities by highlighting the fact that the members of the multiethnic and multicultural communities are in the process of creating new identities. Dey et al. indicated that some organization leaders may attempt to approach the situation by reaching into their home country's culture, some of the people that are part of the multiethnic or multicultural communities created a new culture by mixing the one they left back in their home county with the one they attempt to adapt to in the United States.

Organization leaders make informed decisions to develop strategic marketing plans when they are familiar with the diverse groups in their community. Nonprofit organization leaders want to be able to reach the people that currently make up their communities. They want to engage with the people and serve them in the best way possible. Kipnis et al. (2021) addressed an important concept of multicultural marketing, the ability to fully reach an inclusivity of all the individuals and the multi-ethnic or multicultural groups. Organization leaders do not want a demeaning representation of the organization or its leadership. It is important to incorporate culture when creating an organizational marketing strategy. The alignment between cultural values and the individual could be influential in the reception of marketing messages from an organization (Sobol et al., 2018). Sobol et al. (2018) also highlighted the importance of culture in the creation of identities. Grier et al. (2019) also addressed the concept of identity, which connects race to an identifying characteristic that range from biological characterizations to cultural characterization. Grier et al. further looked at race as a marketing aspect, which highlighted the hierarchical structure based on an individual's physical or cultural traits.

When organizational leaders face individuals with intersectional identities that problematize the placement of that individual in a heterogeneous space, they struggle to craft strategic marketing approaches that will individualize their approach. Among the major identities or the groups that people identify with, there may be subgroups. For example, a potential subgroup within the larger group identity of African Americans is the hip-hop subculture, which has an urban identification (James, 2019). The subgroups have specific features or characteristics that connect in some way to the main identifying group. When it comes to scenarios such as multiple identifying aspects, Kipnis et al. (2021) advocated the need for extensive marketing research, the opportunity to be well educated on the groups and individuals, and the encouragement for organization leaders to keep attempting and using best practices for diversity and inclusion for all people.

Organizational leaders should understand the existence of inherent shortcomings when attempting to address the diversity of any organization. Organizational leaders may confront barriers that affect the organization leaders' ability to execute approaches focused on diversity, equity, and inclusion in their marketing campaigns. One of these shortcomings becomes apparent when organizational leaders vocalize their willingness to address the idea of diversity but remain unwilling to initiate specific changes (Kipnis et al., 2021). Some organization leaders may approach a developing diversity strategy in the wrong way because of the outcome that they are looking to gain from their efforts. The need for an intact approach that addresses the multiple aspects of diversity and is authentic could build trust within the community (Kipnis et al., 2021). Nonprofit organization leaders should identify the reasoning behind addressing diversity within their organizations before proceeding to attempt changes. Organization leaders should also look at the ways that diversity within their organization may affect or influence their stakeholders (Kipnis et al., 2021). Some stakeholders may not want to align themselves with an organization that constantly promotes specific aspects of diversity or diversity as a whole. Stakeholders are critical to organizations, so organization leaders should be mindful of the risks associated with approaching diversity within their organization. The possibility of an organization facing discrimination and unwillingness from current staff and volunteers; and potential staff and volunteers, or even the board of directors could hinder any attempt to address the concern for diversity within the organization. The fact that organizational structures vary even within the changing composition of the population, and the need for effective diversity measures, especially in marketing, it is almost impossible to create a solution that would work for every organization (Beniflah, 2020). Nonprofit organization leaders may also experience problems when addressing multiculturalism and marketing because of the composition of the community, and the organization's scope. For example, within a membership-based nonprofit organization, the leadership may realize that they currently need to recruit people between the ages of 18 to 25. Within the community that the nonprofit organization serves, less than 1% of the population is between the ages of 18 to 25. If the nonprofit organization leadership focuses its efforts on an age range that is rarely existent and the ones that are existent have little interest, it could result in time and money wasting. Where the nonprofit organization neglected the high level of the population with over 50% of African American women between the ages of 25 to 35, an aspect of diversity that the nonprofit organizational leaders did not direct their focus. Kipnis et al. identified another barrier for nonprofit organization leaders attempting to incorporate multiculturalism with marketing strategies: the lack of a knowledgebase in diversity work. The lack of a solid knowledgebase relating to diversity strategies across the board for organizations could present a learning curve for organizations that are new to the process of implementing diversity practices.

Organization leaders would need to create a solution that fits their organization. Within nonprofit organizations, there are also distinct categories and types of nonprofit organizations. Membership-based nonprofit organization leaders would have to develop a strategic plan that is different than a nonprofit organization that is strictly cause-driven. Membership-based nonprofit organization leaders would need to retrieve information about the characteristics of their current members and the current characteristics of the community that they serve and use the analysis when determining strategic processes. Organization leaders can strategically use the analysis to target the minority groups in their marketing strategies by creating messages that prompt the majority to support the minority group causes (Peñaloza, 2018). However, even if demographic analyses of current members and target outreach communities exist, deploying successful marketing strategies for diverse member retention and recruitment face additional challenges.

Struggles to Market for Diverse Member Recruitment and Retention

Organization leaders may struggle to employ marketing strategies that produce positive changes for diverse member recruitment and retention outcomes. Nonprofit organizations struggle to diversify their membership base for a variety of reasons. One important factor that could hinder effective diverse membership recruitment and retention efforts is the inability to identify diversity among the population served by the nonprofit organization. It would be difficult for nonprofit organization leaders to seek diverse groups if the diverse groups are nonexistent due to the presence of the dominant Eurocentric culture in the United States (Arday et al., 2021). Thus, nonprofit organization leaders must constantly strive to remain aware of constantly changing demographics in the communities they serve and be sensitive to the manner the needs of such communities may change in relation to their composition.

Educational and financial factors may hinder minority groups from engaging with specific organizations (Swartz et al., 2019). Membership-based nonprofit organization leaders should understand that membership requirements such as membership dues, uniforms, or participation in membership activities may not align with the educational or financial situation of the underrepresented groups (Ingersoll et al., 2019). Economic well-being contributes to the decision-making process for members in membership-based organizations. Hou et al. (2020) confirmed that minority groups are more likely to struggle economically, and with the added experience of the COVID-19 pandemic, the economic barriers worsened for underrepresented groups. Being well-educated, having wealth, and having the free time to participate in activities offered by the organization are all ideal characteristics of members (Achury et al., 2020). Membership-based nonprofit organizations require a fee, and although some nonprofit organizations provide aid for members who cannot afford the full price, availability and accessibility are still factors.

Danley and Blessett's (2022) determined that the high-profile nonprofit organizations have more white members. In lower-income neighborhoods where high-profile nonprofit organizations thrive, the majority of the population identifies as (a) African American, (b) American Indian, (c) Hispanic, and (d) Asian and Pacific Islander (Williams & Cooper, 2019). When nonprofit organization leaders seek to diversify their recruitment efforts, they need to attract people from minority communities.

As such, organization leaders should understand the history of the organization and its history as it relates to the minority groups. One example is Blacks in the southern United States, they are less likely to be involved in acts of volunteerism because of the flexibility of their schedules, financial obligations, and the historical idea of elitism (Marchand et al., 2019). Thus, the possibility of a historically racially oppressive environment could affect diverse membership recruitment and retention (Benson et al., 2021). Nonprofit organization leaders must remain aware of the impacts such historical constructs have on the communities they serve and combat them through active, intentional interventions.

People seek qualities and values that bond them to the nonprofit organization. A commitment to an organization is similar to aligning with its brand. The branding of popular membership-based nonprofit organizations guides the decisions of future members. Webster et al. (2020) implied that organization leaders already knew the people they seek to be members of their organizations, and those seeking membership into organizations may understand the organization's values. Commitment to the organization is necessary for consistent volunteer leadership on boards of member-based nonprofit organizations (Miller-Stevens & Ward, 2019). Popular membership-based nonprofit organizations such as the YMCA, Young Women's Christian Association, the Girl Scouts, and the Boy Scouts are known for their effective branding. People recognize their branding and understand what their branding means. Even though aligning with the brand is important, Hustinx et al. (2022) hypothesized that there is a failure in the recognition of vulnerable groups, especially regarding volunteerism. Whether by being a volunteer or a member of a membership-based nonprofit organization, people choose their memberships based on factors of alignment (Thibault, 2020). Nonprofit organization leaders should ensure that they meet the needs of the vulnerable groups, but it is unclear whether vulnerable groups benefit from being part of a brand.

Economically, underrepresented communities make up most of the lower-income populations and thus create a problem for a membership-dependent organization, because of unreliable funding sources (Venkataramani et al., 2020). For example, a nonprofit organization leader at a high-profile membership-based organization looking to increase the diverse membership population would need to address the fact that most of the diverse potential applicants would be of lower income status and would therefore qualify for reduced pricing on memberships or services. When nonprofit organization leaders continuously recruit the lower income population, there could be adverse economic effects on the nonprofit organization and jeopardize the nonprofit's sustainability.

The geographic location of underrepresented groups within the United States is also relevant to determining whether diverse recruitment and retention efforts could be successful. According to data collected by Bleich et al. (2019), the majority of people of color reside in the southern states of the United States. Between 2019 and 2020, the southern states of the United States had the lowest median income (Shrider et al., 2021). Connor and Storper (2020) found that the poverty levels in the southern United States remained constant from generation to generation. Nonprofit leaders must take these factors into account as they seek to build a model of inclusive representation in their organizations, particularly if they seek to increase minority membership which draws on southern U.S. communities.

Nonprofit organization leaders may struggle to diversify in the southern United States due to poverty (Walters, 2021). They may also struggle in the northern region of due to lack of diversity among members (Danley & Blessett, 2022). Nonprofit organization leaders usually develop their organizations in areas of economic and ethnic diversity (Lecy et al., 2019). Nonprofit organization leaders must ensure that they can sustain their ventures, including meeting their served population's needs. Nonprofit organization leaders want to diversify their staff, boards, volunteers, and members. There was always a need for diversity in nonprofit organizations, but it was not previously advocated for due to its nonexistence in some organizations’ mission (Taylor et al., 2019). Some nonprofit organization leaders include diversity statements in their mission and vision so that the target audience can clearly see their stance. Organization leaders may encourage their leadership and workforce to take part in activities and training to show their commitment to making positive changes. Onyeador et al. (2021) recommended that organization leaders avoid using implicit bias training to address diversity but instead analyze the core of the organization and how the leadership intends to tackle the lack of diversity within the organization. Organization leaders must first see the problem of racial inequity within their organizations before being able to make changes within the community (Livingston, 2020). Resistance is possible, but if organization leaders want to pursue the incorporation of diversity into their organization, overcoming resistance to change will be necessary (Spaaij et al., 2020). The ability to accept that changes should occur depends on the organizational leader's ability to identify, accept, and be willing to make changes. Dennissen et al. (2020) communicated a synonymous point: organizational leaders have minimal options to choose from when tackling diversity strategy implementations. Murrar et al. (2020) reiterated that diversification is a struggle to implement and accomplish. Furthermore, Leslie (2019) asserted that strategies to increase diversity are not always successful, although organization leaders invest a lot to improve diversity within their organizations.

Often, organizational leaders' misunderstanding of foundational concepts associated with diversity contributes to their collective struggle implementing strategies aimed at increasing diversity. Nkomo et al. (2019) described the misunderstanding of assigning individuals to single categories, which presents difficulties when attempting to meet the needs of all people. A lack of understanding could affect the way organizational leaders craft messages (Carnes et al., 2019). For example, if marketers and organization leaders have minimal knowledge of the cultures around them, they could incorrectly craft messages that appear to be stereotypical. Abaker et al. (2019) contended that diversification is more than recruitment. Instead, organizational leaders need to put effort into understanding the diverse members within their organization, which could benefit the organization by allowing organizational leaders to utilize the skills and specialties of their diverse audience.

Some organizational leaders understand that the implementation of diverse strategies for recruitment and retention present challenges. For instance, Inegbedion et al. (2020) emphasized discrimination, communication barriers, and resistance as the major challenges that could occur when attempting to implement diversification strategies. In addition, Hwang and Young (2020) gathered that the collapse of social cohesion within communities is due to racial diversity within the communities, which further leads to the strangling effect and dwindling of social capital. When undergoing any venture, organizational leaders should understand that there are risks. However, risks could eventually turn into opportunities and develop further into strengths. Diversification of a membership base is a risk for organizational leaders.

Contrasting Theories

The resource-based theory (RBT) along with market orientation (MO) do not fit well with this study, which addresses diversity in recruitment and retention of diverse members for membership-based nonprofit organizations. RBT and MO do not cover the fragility and uniqueness of diversity within recruitment and retention efforts. RBT presents the unique resources that nonprofit organizations have at their fingertips and could potentially create a competitive advantage. When organizations incorporate MO for their internal and external audience, they can align with RBT to ensure a competitive advantage in the industry. Thus, membership-based organizations could utilize the strategies of RBT in collaboration with MO to increase their membership, but for a diverse membership base, RBT and MO do not have strategies for the different diverse groups.

Nonprofit organizations are not exempt from competition. In fact, nonprofit organizations have seen an increase in competition since for-profit organizations intensified focus on their leaders' approaches to corporate social responsibility and decreased multiple sources of funding (Topaloglu et al., 2018). RBT and the MO would not effectively apply to nonprofit organization leaders who are seeking to build their membership base, especially a diverse membership base.

Nonprofit organization leaders can use an MO to ensure a customer-centered approach, contributing to gaining and maintaining a competitive advantage in the human services industry (Hussain et al., 2016). Incorporating RBT with MO grants nonprofit organization leaders the opportunity to fulfill the customer-centered approach using its eccentric resources (Morgan et al., 2009). Even though both theories take into consideration the idea of a customer-centered approach, Burton (2002) emphasized the importance of a further breakdown of the customer. Within the persona of the customer are subcultures, which may affect the entire customer role.

The method of measuring success impacts the overall performance of nonprofit organizations. However, nonprofit organization leaders may view success differently. For nonprofit organization leaders, success may be construed as: the number of members in the organization, the amount of money obtained from fundraisers or donations, or stakeholder engagement. Even though the weight given to a particular measurement may differ between nonprofit organizations, they all have their unique approach for doing what they do or their “why.” Knowledge of a nonprofit organization’s “why” translates in the individuals associated with the nonprofit organization and its people’s passion; passion is the eccentric resource (Mendoza-Walters & Ivanov, 2016). When nonprofit organization leaders can apply their eccentric resource to their impact and utilize MO to translate their eccentric resource as a customer-centered approach, they create an impact that allows them to measure their success across a broad spectrum. The organization will compete on a broad spectrum, where success is possible. However, such a broad spectrum is what deteriorates the idea of diversity within marketing strategies for diverse recruitment and retention. It is the job of the nonprofit organization leaders to present the eccentric resource to create an impact. Innovatively presenting the eccentric resource found in a nonprofit organization can guide the success and competitive advantage, but if nonprofit organization leaders seek diversity, a broad approach may not be best.

RBT and Components of Success

RBT presents the eccentric resource that nonprofit organization leaders need to incorporate MO and achieve competitive advantage. RBT applies to four major components. The components include human resources development, communication, stakeholder engagement, and the target audience.

Human Resources Development and RBT

When a nonprofit organization leader seeks to incorporate staff into the organization, the emphasis is placed on finding employees whose values align with the organization and those who are willing to invest in their staff (Davis & Simpson, 2017). This is similar to nonprofit organization leaders seeking to add members to their membership-based organizations. Davis and Simpson (2017) conducted a qualitative study that used RBT to show how the human resource department plays an essential role in developing employees who will eventually share the organization's passion. The employees in the study were eccentric resources. The researchers found that if the employees developed as individuals, the organization grew. Using RBT to highlight a nonprofit organization's staff as an eccentric resource is a good approach, but it also limits the idea to allow for individualism. Staff in the context of nonprofit organizations extends to volunteers. When volunteers feel as though they are part of the team, they are willing to perform well. Furthermore, nonprofit organization leaders seeking a solid or eccentric membership base also experience the welcome from the organization and feel as though they are part of the organization. However, the lack of understanding of the subcultures within the team could affect organization leaders from achieving their goal of meeting the needs of all.

Communication and RBT

RBT connects with the communication component via branding. An organization’s unique brand is a competitive aspect (Gao et al., 2018). Gao et al. (2018) conducted a qualitative study that showed how an organization’s brand is an eccentric resource. The branding on the organization could mean unique colors, logos, or jargon. An organization’s distinctive branding, once developed effectively, can initiate competition. When MO connects with an eccentric organization brand, the customers align with the specified colors, logo, or jargon drawn to the organization. Gao et al. reviewed the answers from two rounds of interviews in the data collection process. They placed a focus on the use of social media to incorporate brand communication. Gao et al. found that there were limitations to the study that would require further research. Organizational brand is a method for organizational leaders to build relationships with their customers.

Stakeholder Engagement and RBT

Stakeholder engagement is another eccentric resource that can apply to RBT. Sustainability may depend on stakeholder engagement (Ghassim & Bogers, 2019). Ghassim and Bogers (2019) determined how stakeholder engagement can benefit organizations by providing sustainability and further determined how organizational leadership can be strengthened by its ability to show how having different types of stakeholders involved with an organization can contribute to innovation, thus revealing the need for diversity and understanding individualism. Ghassim and Bogers used a mediation model to test the collected data on a transactional and relational level. They found that the financial factors that some organizations use to measure success are not always applicable to stakeholder engagement. Similarly, there is a need for stakeholder engagement for the diversification of an organization by presenting varying viewpoints (Clarke & MacDonald, 2019). Clarke and MacDonald (2019) believed that having varying viewpoints could benefit an organization's sustainability regarding the plan, process, and partner outcomes. Clarke and MacDonald presented research detailing the social benefits obtained from the approach. The social component or resources led to the creation of financial resources, adding to overall sustainability. The study by Clarke and MacDonald is an example of organizations leveraging its "why." However, Clarke and

MacDonald faced challenges in finding stakeholders who aligned with the organization's mission. RBT and MO fell short of digging further into diversity and individualism.

Target Audience and RBT

A product-service innovation approach allows organizations to align their products to their targeted customers (Bustinza et al., 2018). Bustinza et al. (2018) conducted a quantitative study that looked at using customer knowledge to design how to create products strategically. They collected data that revealed the connection between product-service innovation and the organization's performance and then disseminated the information from the metrics. Customer satisfaction was the central concept attributed to competitive advantage (Bustinza et al., 2018). Bustinza et al. identified six types of performance levels among organizations. Having a broader spectrum of performance measurement was a strength for the study. However, there were issues in the methodology of the study, and continued research is a recommendation.

Retail is not the only industry where modern mobile technology impacts consumer behavior and contributes to competitive advantage (Adivar et al., 2019). Adivar et al. (2019) conducted a quantitative study that showed how restructuring a mobile technological approach to meet a developing customer's needs could put organizations at an advantage. MO failed to demonstrate how nonprofit organization leaders could utilize mobile technology to develop apps that would create a more individualized approach to data collection and analysis. The mobile technology was a unique resource and different aspects were analyzed to show an organization’s performance and sustainability. Adivar et al. compared the success of other retailers and created a framework for measuring success within the industry.

Impact Measurement and Market Orientation

MO affects the way nonprofit organization leaders perform or impact their communities. Nonprofit organization leaders need to understand the measurement used for their impact. Organization leaders may use different methods to measure their organization's impact. Rawhouser et al. (2019) addressed four forms of impact, suggesting that a multisector approach that measures impact across a broader spectrum would be best. Nonprofit organization leaders who understand their impact may better understand how they impact their consumers across a broad spectrum. This allows nonprofit organization leaders to do a better job of employing a market orientation strategic plan to make the necessary improvements. Learning about an organization's impact can show how the nonprofit organization sustains its programs, how it reaches its target audience, and how it engages stakeholders. These aspects cover multiple sectors across a broad spectrum. When nonprofit organization leaders couple their impact scores with their MO strategies, there is the possibility of innovative improvements. Innovative improvements across a broad spectrum of the nonprofit organization can help the nonprofit organization gain and maintain a competitive advantage within that industry. Still, the struggle with approaching impact measurement on a broad spectrum makes it difficult for nonprofit organization leaders to address the problem of diversity in marketing strategies.

MO if used correctly, can be significant. Organization leaders can use MO to prompt the necessary changes to meet the needs of those served (Na et al., 2019). For a nonprofit organization leader, this could include implementing new communicative practices such as utilizing a social media platform to engage a target audience. With the current crisis of COVID-19, MO can be a deciding factor in the delivery of programs during such a crisis. Nonprofit organization leaders may choose to move their programs virtually or offer hybrid programming in some situations, which offers options or diversifies the way the organization operates or meets the needs of people. Na et al. (2019) effectively connected innovative practices with MO. Nonprofit organization leaders can use MO innovatively in other forms. The possibility of having virtual volunteers on the nonprofit organization's team or utilizing meeting platforms such as Microsoft Teams and Zoom is due to MO.

MO impacts not only external customers but also internal customers. Based on the study by Narsa (2019), MO and innovation connect well to affect the organization's overall performance; the performance of the company contributes to the level of competitiveness. Competition is present in nonprofit organizations as well, especially when it comes to ensuring the sustainability of the nonprofit organization. Gaining and maintaining competition is important, but Burton's (2002) argument continues to highlight why MO may not be best because of its inability to look deeper for diversity and diverse groups.

Organization leaders engage in strategic planning which will ensure the use of MO as an effective force. Although nonprofit organizations engage in social impact projects, there are some nonprofit organizations that still have a social responsibility. This factor is dependent on the leadership of the nonprofit organization and how they strategically plan. For example, nonprofit organizations, such as hospitals, use an MO process to guide their social responsibility; this could influence their internal performance, which impacts their external consumers (Hwang & Chung, 2018). The management team analyzes results from MO strategies to make decisions that they know will develop the organization internally and externally. Nonprofit management will use MO to simplify operations and to make things easier for their staff and volunteers. These strategies collaborate well with innovative practices. Effective staff performance or for membership-based nonprofit organizations, effective and efficient membership engagement, is a result of the coordination of MO and social responsibility (Hwang & Chung, 2018). This combination of social responsibility and diversity-positive staff orientation can provide a useful model for nonprofit leaders' marketing strategies.

Market Orientation and Background

The use of MO by organization leaders takes into consideration internal and external factors, a SWOT analysis, and the organization's structure and culture. These could impact the results when organization leaders attempt to incorporate MO (Gupta et al., 2019). Biases from the obtained information from some target audience, could affect the reliability of the MO approach. If the results are biased, then using the results to strategically plan could result in failure for the nonprofit organization leaders. Nonprofit organization leaders should be careful as to how they obtain the information for their MO approach. Additionally, nonprofit organization leaders may implement software to obtain the data in the form of leads. Nonprofit organizations' marketing teams could implement strategies on social media and the organization's website to drive traffic or to obtain information about the needs of their consumers. Nonprofit organization leaders that struggle with the virtual implementation or have problems where their target audience does not use the virtual form of communicating, can use focus groups, paper surveys, and even live events. The challenge is to ensure that the answers are as honest as possible, and the questions obtain the necessary information to make informed decisions. When a nonprofit organization leader obtains the necessary information from their MO approach, they can strategically plan or reassess services or programs. A nonprofit organization leader's ability to utilize their MO well could affect how stakeholders see their impact. If MO can align a potential stakeholder's interest with the nonprofit's impact, there is a greater possibility of getting that stakeholder on board.

Market Orientation and Resource Based Theory

RBT in connection with MO would not effectively apply to this study to address the business problem. RBT presents the unique resources that nonprofit organization leaders have at their fingertips and can use to their competitive advantage. The eccentric resources outlined, such as human resources, communication, stakeholder engagement, and the target audience focus, are all intangible. These intangible resources measure success on a broad scale for nonprofit organizations. When organization leaders incorporate MO for their internal and external audience, they can align with RBT to ensure a competitive advantage in the industry. Members for a membership-based nonprofit organization are the primary sustainable financial source, which means a strong membership-based, and a diverse membership-based may provide a competitive advantage. The need for a diverse membership base would not work well with RBT and MO because of the focus on a broad spectrum. RBT and MO are great theories that will aid nonprofit organization leaders in competitive advantage, but both theories struggle to find the importance of individualism and the subgroups that affect diversity.

My literature review revealed that the current scholarship treating effective business marketing practices identified diversity as a key area for organizational improvement. The literature identified CMMT as, perhaps, the most effective conceptual lens to consider the manner business can make significant gains in organizational diversity. Because CMMT places diverse community members' lived experiences in the fore, and problematizes the homogenizing effects of quantitative analytic approaches, this study necessarily focused on qualitative aspects of diverse communities' experiences and leveraged them explore effective methods of improving organizational diversity.

Transition

In Section 1, I presented the foundation of the study, which included the following components: background of the problem, problem statement, purpose statement, the nature of the study, research questions with the associated interview questions, conceptual framework, operational definitions, assumptions, limitations, and delimitations, and a review of the professional and academic literature.

In summary, Burton's (2002) CMMT addresses a critical component for membership based nonprofit organization leaders who want to recruit and retain diverse members. Burton's theory addressed strategies that highlight the need for nonprofit organization leaders to be mindful and to strategically address diversity within their organization. It is common to see a diverse staff and a diverse board within nonprofit organizations, but nonprofit organizations that are dependent on memberships sometimes struggle with diverse recruitment and retention. Burton and other researchers highlight the importance of diversity. Diversity is essential within nonprofit organizations and for-profit organizations. Diversity provides a representation of the community which the organization serves. Organizational leaders cannot address recruitment and retention without addressing marketing strategies. Effective marketing strategies will produce tangible results when applied to recruitment and retention efforts. Some researchers mention the difficulty in marketing to a diverse audience, and therefore utilize marketing strategies that are homogenous and result in an inability to reach specific groups of people. Burton suggested that organization leaders develop an understanding of their target audience. Membership based nonprofit organizations struggled with recruitment and retention even more during the COVID-19 pandemic. The membership-based organizations such as the YMCA or Girl Scouts that met in person for activities and recruitment efforts were unable to accomplish such task during the peak of the pandemic. The COVID-19 pandemic restricted organizational leaders' ability to effectively market the organization's brand to their target audience. With the restrictions, Burton still highlighted the importance of nonprofit organizational leaders understanding their audience. Burton noted the importance of nonprofit organizational leaders' ability to individualize their marketing – after developing an understanding of their audience.

Other theorists such as Barney (1991) and Narver and Slater (1990) who developed the RBT and the MO, respectively, were the contrasting theories used. The RBT addressed essentializing people as a resource (Barney, 1991). Although Barney was addressing the idea of understanding people and aligning the mission of the organization with the individuals, the approach was on a broad spectrum. Narver and Slater's MO theory further addresses looking at the alignment of people with the organization, which also took a broad approach.

Based on research, effective recruitment, and retention strategies, especially among a diverse target audience, and for membership based nonprofit organizations is dependent on the understanding of the target audience and strategically applying that knowledge to marketing techniques. The theorists failed to stress the importance of individualizing the target audience and looking at the unique perspectives of subgroups. The RBT and the MO theory would not fully support a diverse audience. The theorists did not specifically target aspects of marketing to a diverse audience, which requires further analysis of subcultures and subgroups.

In Section 2, I will outline the details associated with the project including the role of the researcher, participants, research method and design, population and sampling, ethical considerations, data collection and analysis, information regarding the reliability and validity of the data, as well as a summary section. Additionally, I will propose the approaches used to protect participant confidentiality, including the storage and retention of data and electronic documentation associated with the study.

In Section 3, I will use interview questions in conjunction with the 2019-2020 Baldrige Excellence Framework as an assessment tool to depict a comprehensive analysis of the client organization's key organizational characteristics, systems and processes, and results from this qualitative single-case study. I will use the Baldrige Performance Excellence Program (2019) to explore the client organization’s leadership, strategy, customers, knowledge management, workforce, operations, and results.

Section 2: The Project

Purpose Statement

The purpose of this qualitative, single case study was to explore the strategies that nonprofit organization leaders use to recruit and retain a diversified membership. Participants for this study were leadership team members from a nonprofit organization located in the eastern region of the United States who have successfully developed and implemented strategies to recruit and retain a diversified membership base for their organization. The implications for positive social change may include the potential to diversify the board and the organization, thereby ensuring that the organization can provide its services to the surrounding communities.

Role of the Researcher

As the researcher, I served as the apparatus involved in the data collection phase of this qualitative study. Wa-Mbaleka (2020) emphasized the importance of the researcher as an individual involved in the data collection method. Wa-Mbaleka further metaphorized the noun *instrument*, making a connection between the methods of data collection performed by the individual and an actual instrument used to obtain data. I had a previous connection with the topic through addressing diverse recruitment and retention within nonprofit organizations from previous employment opportunities. Based on my experiences from previous employment opportunities, some nonprofit organizations that are dependent on membership as a source of revenue or as a source of sustainability struggle to recruit and retain a more diverse membership base. Nonprofit organization leaders realize the importance of diversity as a means of representation within their organization, and therefore, I was able to suggest and implement strategies that assisted with the recruitment and retention of a more diverse membership.

When the then Department of Health, Education, and Welfare analogously to the National Research Act developed the National Commission, the purpose was to investigate ethical practices and principles for protecting human subjects (Nagai et al., 2022). The result of such investigation led to the creation of *The Belmont Report*, which provided guidelines based on three principles: (a) respect for person, (b) beneficence, and justice (Jefferson et al., 2021). *The Belmont Report* provides a deeper look into the three principles and an assessment of the significance of the requirements of these principles when addressing research involving humans (White, 2020). Ienca and Vayena (2021) suggested six requirements for research: (a) uniqueness, (b) risk-benefit assessment, (c) consent, (d) traceability, (e) privacy, and (f) institutional review board (IRB) approval. Research that does not protect and enhance the autonomy of the participant, ensure a reduction in potential harm to the participant, and highlight fairness in participant selection process would be unethical (Pancras et al., 2020).

Participation in the study was voluntary, and participants were aware of the extent of their involvement in the study, which they confirmed. I treated each participant in the study ethically by upholding and abiding by the guidelines, policies, and procedures provided by Walden University DBA Consulting Capstone. Ensuring that Walden University students practice ethical research, the IRB makes sure that the university remains compliant with ethical research standards and federal regulations. Obtaining approval from the Walden University IRB was a requirement for data collection and analysis. The IRB process is designed to protect the interests of human subjects involved in a study.

I obtained IRB approval before I began collecting data, which was a requirement. I reviewed documentation provided by the client leader organization as well as using web and social media platforms to review documentation found there. The web-based platform, GuideStar, provides data about nonprofit organizations in the United States. The two social media platforms that I retrieved relevant data from for my client organization were Facebook and Instagram. To progress forward to the interview stage, the client leader received a copy of the interview protocol (see Appendix A) I developed. I conducted semistructured interviews via Zoom, a web-based platform, as a method of data collection. Obtaining and analyzing an organization’s documents could potentially reduce some ethical concerns that are associated with a qualitative research method, and it may also reduce the potential for failures in technological approaches, such as video conferencing (Morgan, 2022).

Semistructured interviews are part of the qualitative research method of data collection. McGrath et al. (2019) suggested that the researcher utilize their background knowledge of the problem as a means of understanding the participants’ responses to the interview questions. Another suggestion was to listen to the participants’ responses actively and avoid speaking for the participants during the data collection process in the form of a semistructured interview (McGrath et al., 2019). Use of the suggested practices during semistructured interviews for data collection as stipulated could avoid contamination or biases, which could affect the validity of the overall research. There is a preference for semistructured interviews when collecting qualitative data because it allows the researcher to comprehend a distinctive point of view and has the potential to allow the researcher to further probe or explore the problem (Adeoye-Olatunde & Olenik, 2021). In general, researchers should aim to maintain rigor and quality when conducting all phases of qualitative research: the design phase, data collection phase, data analysis phase, and the reporting phase (Johnson et al., 2020).

Transcription of the data obtained from the semistructured interview responses falls within the role of the researcher. Previous knowledge of the problem could present potential biases, but it is the role of the researcher to look inward at their biases and have a sense of separation and reasoning, which is an essential component of ensuring rigor and validity (Johnson et al., 2020). During the process of data collection, analysis, and reporting, I had to be mindful of any potential biases that may arise. The mitigation of bias and avoidance of inserting the researcher's own perspectives into qualitative data analysis includes finding a research topic; identifying a conceptual framework to develop the topic; performing purposive sampling; achieving data saturation; finding themes; utilizing a software to assist with data analysis; incorporating peer-reviewed articles for support; inferring valid conclusions from analysis; and reporting findings with clarity, organization, completeness, and accuracy (Johnson et al., 2020). Reflexivity also aided in the mitigation of my own personal bias by engaging in self-reflection (see Earnest, 2020). I understood that there could be potential bias, but my views were not relayed to the participants to avoid interfering with their answers during the interview process. I used member checking and an interview protocol as well as reached data saturation to mitigate potential bias and ensure the reliability and validity of the research.

Participants

Walden University DBA Consulting Capstone administrators vet the client organizations. Students undergo an interview process, and the administrators partner selected students with a client organization. I focused on the leadership team of an eastern United States nonprofit organization as my client organization and the participants of this study. The Walden University DBA Consulting Capstone administrators' guidelines were influential in the selection of the three individuals to participate in this study. Since the client organization had a single, paid staff member and an unpaid worker overseen by the leadership team, three participants from the leadership team provided me with the most pertinent information for the study. Additionally, the ability to use triangulation and validation of the data from the interview, the ability to provide relevant data that would aid in identifying crucial themes in relation to the organization's strengths and weaknesses, and the ability to have an alignment with the organization's documentation analysis were contributing factors to the participants' selection. I used purposeful sampling, which Shaheen and Pradhan (2019) described as having an extensive approach to the phenomenon.

All participants (a) served the organization in some capacity for at least 5 years, (b) had extensive involvement in organizational fundraising, and (c) had extensive involvement in membership recruitment and retention. The participants in this study each consented to the interview. I established methods to ensure a strong working relationship and a continuous consultative relationship with participants and the client organization, such as sitting in on their monthly board and committee meetings, having phone conversations with the client leader every 2 weeks, and visiting the client organization to attend and support their membership drives and fundraiser events. I applied the strategic approach of member checking, which Candela (2019) described as a method of maintaining validity in qualitative research. I also regular communicated via email, telephone, teleconferencing, or in person with the organizational leaders, which built a bond that could persist after completion of the doctoral study.

I met with the participants via teleconferencing prior to conducting the interviews to provide an explanation of the details, process, and procedures involved in this study. The participants met with me on weekly phone calls for 4 months to determine the problem. The participants and I also had check-ins every other week to check on progress with strategies to address the problem and gather data. I always sent a follow-up email of every conversation that I had with the participants so they could review it for accuracy and completeness as well as fact check for errors.

I used theoretical coding to analyze the data from the participants' interviews. Coding involves the process of utilizing unprocessed data and finding common sense from that data (Linneberg & Korsgaard, 2019). Furthermore, theoretical coding is used to look for categories or common themes from the data. The coding process was manual, and I utilized Microsoft Excel to sift through the data by organizing participants according to their period with the organization.

Research Method and Design

Research Method

I used a qualitative research methodology in this study. The qualitative research methodology allows researchers to explore and understand individuals' lived experiences (Yin, 2018). Use of the qualitative methodology allowed for the exploration of the strategies that organizational leaders need to effectively develop and implement a recruitment and retention strategic plan for a diverse membership base for their organization. The qualitative methodology provides the researcher with a deeper meaning of the phenomenon under study (Queirós et al., 2017). Instead of the inclusion of numerical representation, as in the quantitative method, researchers use the qualitative methodology to further explore a deeper understanding of the problem, which addresses the unquantifiable aspects of reality (Queirós et al., 2017). A focus on the analysis of the participants' feelings, emotions, perspectives, and understanding are key components when using the qualitative methodology (Rahman, 2020). A disadvantage of using the qualitative methodology is the inability to provide contextual sensitivities due to the lack of numerical representation (Rahman, 2020).

The quantitative methodology allows for the quantification of data or the use of numerical information, which allows researchers to generalize (Rahman, 2020). The inability to address the social phenomenon creates a disadvantage for quantitative researchers, thus limiting these researchers by removing the important aspect of analyzing the experiences and perspectives of the participants (Rahman, 2020). A quantitative study would have been inappropriate to consider elements, such as the lived experience of diverse members of a community, which are often homogenized or overwritten by quantitative analyses.

The combination of the qualitative and quantitative methodologies is known as the mixed-method methodology (Taguchi, 2018). The mixed-method approach was not suitable for the current study because of identified challenges with this type of methodology. The mixed-method approach requires a specific way of analyzing data, which incorporates aspects of both the qualitative and quantitative methodologies (Taguchi, 2018). When using mixed methods, researchers should be well versed in both qualitative and quantitative methodologies to ensure that they maintain the rigor of research in both the qualitative and quantitative analyses (Taguchi, 2018). Because the research question in the current study involved seeking to explore and understand individuals' lived experiences, there was no need to introduce a combination or the mixed-method approach (see Yin, 2018).

Research Design

A single case study was suitable for this study due to my intentions, which included the exploration of effective strategies for a diverse recruitment and retention capacity for a nonprofit organization. A researcher uses a single case study design to critically explore and analyze the current circumstance within an actual case (Yin, 2018). A rationale for selecting the single case study design instead of the multiple case study design is that the single case study design allows the researcher to test a consequential theory (Yin, 2018). A multiple case study is not always practical due to the possibility of inconsistency across each case, which may invalidate the findings of the results (Yin, 2018). In the current study, the use of the single case study design was dependent on reliable data collection from semistructured interviews with the executive team of the client organization, web and social media platforms, and organizational files.

Other qualitative designs include phenomenological and ethnographic designs. Researchers use phenomenology to explore the meaning behind participants' experiences (Dodgson, 2017); therefore, this approach was not appropriate for the current study. An ethnographic design is not individualized but allows the researcher to observe the participants through the patterns within a given population (Dodgson, 2017). The techniques of finding the patterns within a given population were not relevant to the current study.

I triangulated the data sources by collecting data from various sources in this study, such as semistructured interviews, organizational documents, and web-based platforms. Thus, I achieved data saturation. In qualitative research, data saturation occurs when data collection sources are enough, and it is no longer possible to introduce new data (Gill, 2020). Data saturation also includes the exhaustion of data analysis, and reaching the point in data collection where no new themes could emerge (Hayashi Jr. et al., 2019). Because data saturation occurs when there is an exhaustion of data collection methods and analysis, reaching data saturation contributed to the sample size of the study (see Kackin et al., 2021).

Population and Sampling

The study sample consisted of three participants who were considered as part of the leadership team for a nonprofit organization located in the eastern United States. I was assigned to the client organization as part of my Walden University DBA Consulting Capstone. Based on the guidelines of the Walden University DBA Consulting Capstone, I selected three individuals from the client organization based on their roles in the organization and their ability to provide pertinent information for the current study. Each participant was experienced using strategies to recruit and retain a diversified membership base for their organization.

I received consent from participants of the study in February 2021. I engaged in a discussion with the client leader about the study’s interview procedures; reiterated that the process was voluntary; explained the risks, benefits, and privacy aspects; and provided faculty contact. Regular communication was established with the client leader after this point. Data were collected from the participants after I received approval from the Walden University IRB. I used purposeful sampling to select the participants of the study, which is associated with qualitative research and single case study methods and contributed to the exhaustion of data collection sources (see Alizadeh et al., 2020). Purposeful sampling aims to provide a connection that matches the population sample to the objectives of the study (Campbell et al., 2020). Campbell et al. (2020) further recognized purposeful sampling as a means of ensuring the rigor and trustworthiness of the study. The aim of the study involved the exploration of effective strategies to recruit and retain diverse members for nonprofit organizations. The selected participants were directly involved in the recruitment and retention process as well as the organization’s strategic development. Three participants from the leadership team (referred to in the study as Participant 1, Participant 2, and Participant 3) were interviewed as a method of collecting, triangulating and validating data about the client organization and to ensure data saturation. I scheduled an open, informal, semistructured interview with each participant and they received an emailed copy of the interview protocol beforehand. After the interview, I fact checked the information with each participant by providing a transcribed copy of the interview and followed up with a telephone call and video conference meeting to ensure that the information in the transcript was correct.

I theoretically coded the data from the participants' interviews. Coding involves the process of utilizing unprocessed data and finding common sense from that data (Linneberg & Korsgaard, 2019). Furthermore, theoretical coding looks for categories or common themes from the data. The coding process was manual. Utilizing a program such as Microsoft Excel to organize the data can help with categorizing the data. The goal is to create themes from the data, which can also help to ensure rigor and basically makes sense of the raw data (Williams & Moser, 2019). The use of the collected data from various sources in regard to the client organization, and the interviews with the participants of the client organization to ensure data saturation with my client organization and its leaders. Purposeful sampling contributed to the selection of the three participants. Purposeful sampling is used in qualitative research to select participants based on specific characteristics (Kalu, 2019). Researchers use purposeful sampling to enhance the data sources that will lead to answering the research question (Johnson et al., 2020). The roles of the participants in the organization contributed to their selection. The three participants are the most knowledgeable to provide organizational data and feedback.

Ethical Research

As the researcher, ensuring the protection of the research participants is an integral part of conducting research. It was my responsibility, as the researcher, to protect the participants from unnecessary risks. Participants should be aware of their rights as voluntary participants in the research study (Nandra et al., 2020). Walden University IRB (Approval No. 03-24-21-0973698) approval is a mandatory process prior to engaging research participants and initiating data collection. The participants consented to their involvement in this study.

The participants understood the level of protection associated with their consent to participate in the study. There was no means of compensating or incentivizing either of the parties involved in the research study. The protection of the research participants is essential. Thus, I redacted any identifying information from the data presentation and used the pseudonym LMN in place of the client organization’s name, and outlined the three participants as Participant 1, Participant 2, and Participant 3. Securing the data electronically with a password-protected filing system ensures the confidentiality of the research participants and the client leader organization. The secured data will remain stored safely for a period of 5 years to protect the confidentiality of the participants involved in the study.

Informed Consent

Informed consent was required from the participants involved in my study before initiating any form of research per ethical requirements and as a good-standing Walden University student. Manti and Licari (2018) agreed that whenever human beings are involved in research, their consent to conduct such research is a requirement before the start of the research. The participants should also know and understand the requirements and procedures of the research conducted (Manti & Licari, 2018). Biros (2018) further added that informed consent should present all potential risks associated with participation and that the consenting party should understand well and be in the right state of mind to make an informed decision.

Informed consent protects the participants, the researcher, and the collected information associated with the study. The researcher must collect accurate, relevant information for the study and the data collection process must be within the parameters of the law. The researcher must also ensure that the participant’s data are securely protected and adhere to privacy rights. Romanou (2018) outlined that with the advancement in technology and technological devices, data can be more vulnerable, but data can also have multiple means of protection. There are different ways that researchers can securely store data. With the consent of the participants, the researcher can store data digitally on servers that are password protected or keep physical filings in a safe area.

Along with informed consent, the researcher ensures that the research addresses the potential risks involving validity and ensures that the research is reliable. One main data collection method for qualitative research is the use of interview questions, which could present the potential for risk to the validity and reliability of the collected data (Coleman, 2022). Coleman (2022) further noted that there should be some rigor in the questions to ensure that the data collection method adds to some validity and reliability. The questions should avoid biased answers or push for specific answers from the participants. The answers from the participants should not seem coerced. Hayashi et al. (2019) added to the idea of maintaining research validity and reliability, ensuring research quality. Qualitative research has the scrutiny of the potential of being unreliable, thus the need to validate the research quality (Hayashi et al., 2019).

Furthermore, during the current COVID-19 pandemic, the retrieval of informed consent considered the potential of sharing data from a distance or via the internet. The participants can consent via written email or video communication methods such as Zoom or Microsoft Teams. Sari and Nayir (2020) discussed the transition in the education sector where traditional books are now accessible as eBooks. Similarly, in the nonprofit organization sector, some nonprofit organization leaders who did not already have a digital system transitioned to digital sharing of documents and data, which added to the risk of their information being accessible by many. Some nonprofit organizations without knowledge of the proper use of the internet and data sharing struggled to ensure safe data collection methods. Compromised data could potentially risk some nonprofit organizations even more during the COVID-19 pandemic. Ensuring validity and reliability of the data collected is still important during and as there is a transition out of the COVID-19 pandemic. Also, during the COVID-19 pandemic, some nonprofit organizations ceased some of their services, which means they were not collecting their usual data. If the nonprofit organization leaders were not collecting data, there was not a lot of data to share during that period. The study participants will have to be informed and inform the researcher of the current situation during the COVID-19 pandemic.

Research Withdrawal

During the informed consent, participants should be given the option to withdraw completely from the study or to withdraw from the study for a period of time for any reason (Wallace & Miola, 2021). In a situation where the participants desire a withdrawal from the study, the participants should notify Walden University or the current student researcher, stating their need to be removed from the study. Each participant received information about their right to withdraw from the study for any cause as part of Walden University and IRB.

Incentives

When considering incentives, there may be different aspects to think about such as when the incentive is given during the study, the amount, and the meaning behind the incentive (Afkinich & Blachman-Demner, 2020). Piñeiro et al. (2020) found that providing incentives during research were beneficial for participants. Heider and Mang's (2020) research concluded that even though there are benefits to utilizing incentives, there are also disadvantages. I did not offer incentives of any kind to the participants of this study during any stage of the study.

Data Storage

Protection of the participants involved in qualitative research is of utmost importance (Vivek, 2022). Part of protecting the participants involved in the qualitative study meant ensuring the protection of their data. Data were at constant risk for unauthorized access, theft, and fraud that could potentially lead to misuse of data, especially data shared over the internet (Masilela & Nel, 2021). Data could be at risk in the collection, classification, storage, and dissemination process, if proper protective measures are not met (Masilela & Nel, 2021). To ensure protection of the data, I ensured that the participants' organization was masked with a pseudonym and I did not reveal any identifying features. I identified the participants as Participant 1, Participant 2, and Participant 3, which aligned with their specific roles and responsibilities within the organization. I removed all identifying features from any other information to avoid a connection between the participants and their organization. I shared my findings with the participants during a scheduled meeting. Lastly, I stored all the research data and findings hard drive that is password protected for a 5-year period.

Data Collection Instruments

As this research project constituted a qualitative study, I served as the primary data collection instrument. As the primary data collection instrument, a researcher can effectively analyze and corroborate the collected data (Ravindran, 2019). I obtained approval from IRB before I began collecting any of my data. By gathering data from various sources, I was able to process and evaluate its veracity and scope. I reviewed documentation from the client leader organization. I used this to assess the organizational structure and goals of my client leader organization. The data collection process involved obtaining data from semistructured interviews, organization documents, web, and social media platforms.

I collected data through conducting semistructured interviews via Zoom, a web-based platform. Semistructured interviews are part of the qualitative research method of data collection. There is a preference for semistructured interviews when collecting qualitative data because it allows the researcher to comprehend a distinctive point of view and it has the potential to allow the researcher to further probe or explore the problem (Adeoye-Olatunde & Olenik, 2021). Semistructured interviews are recorded and transcribed before the analysis process, which should help with clarity (Johnson et al., 2020). The client leaders received the interview protocol for transparency (Appendix A). I also retrieved information from the social media platforms such as their social post content type, responses to posts, and frequency of posts. The obtained documents from the organization included financial information, organization by-laws, board of directors and committee minutes, strategic plan outline, outline of fundraiser events, membership application, and the board of directors' roster. I attended board and committee meetings and took notes. I had the opportunity to meet with the client leader and discuss the organization's data, current and future projects, and struggles.

Earnest (2020) conveyed various methods to enhance the reliability and validity of the data collection instrument and process in a qualitative research study. Some of the mentioned methods included (a) triangulation, (b) addressing disconfirming evidence and alternate explanations, (c) member checking, (d) reflexivity, (e) prolonged engagement, and (f) persistent observation (Earnest, 2020). I addressed the disconfirming evidence and alternate explanations in the contrasting theories portion of the literature review and the prolonged engagement in the remaining portion of the literature review. I was able to achieve triangulation by utilizing multiple sources and methods. I engaged in member checking by fact-checking the information with the client leader during the different stages of the study and correlating that with obtained digital and physical documents. I received confirmation and acceptance of the interview transcripts, summaries, and interpretations from the participants by phone. Researchers use member checking in qualitative research to mitigate potential concerns to validity and address rigor (Motulsky, 2021). Researchers use member checking by confirming and verifying the gathered data with the participants involved in the research study (Motulsky, 2021). I was able to use reflexivity to mitigate any potential of personal bias as I worked through the stages of the research study. Researchers use reflexivity to examine their perspectives during the data collection process, specifically the interview process (Kalu, 2019).

Data Collection Technique

Prior to engaging in data collection, I obtained IRB approval to conduct research, developed a communicative and trusting relationship with the client leader, and received informed consent. Ensuring a participant-researcher relationship encourages trust, which is essential when working with sensitive data retrieval from the client organization (Johnson et al., 2020). I communicated on a set schedule with the participants and incorporated the Baldrige Excellence Framework to steer my data collection efforts.

In answering the research question about the strategies nonprofit organization leaders use to diversify their membership, I engaged in the data collection surrounding the client leader organization. Semistructured interviews and document study are among the most popular and trusted forms of data collection (Busetto et al., 2020). I retrieved the data from semistructured interviews with the participants of the client leader organization, documents from the organization, the organization's website, and various public websites. I also gathered data by analyzing the reach and impact of social media posts from my client leader organization. An advantage of social media is that it provides a new and exciting medium for data collection and analysis (Carr et al., 2019). The personalized nature of social media provides greater insight into the interests and communication strategies used by individuals (Carr et al., 2019). This allowed me to better gauge the responses to different recruitment efforts. Although social media may be a great way to gauge responses, there are disadvantages such as concerns about confidentiality and consent (Carr et al., 2019). Though this concern is present for the organization and its continued operation, it is not directly relevant to the analysis of data that is the focus of this study.

An advantage of a semistructured interview is that it is a great way to have the participant expound on the topic, but the researcher should be mindful of potential disadvantage to this method such as the possibility of the threat to the internal data (Belina, 2022). An advantage of document retrieval and analysis is that it is subjective and detailed but a disadvantage may also be that it is time consuming and may not be generalizable (Rahman, 2020). The overall goal and advantage of utilizing various data collection techniques is to ensure triangulation and corroboration. Triangulation ensures an extensive understanding based on the multiple approaches achieved from collecting data (Busetto et al., 2020). Triangulation further leads to corroboration, which involves using various methods to present findings and provide confirmation (Lindberg, 2020).

In general, the researcher should aim to maintain rigor and quality when conducting qualitative research. I engaged in member checking to ensure accuracy of the collected data. Member checking allows the participants to validate the collected data

(Busetto et al., 2020). Rigor and quality should be present in the design phase, data collection phase, data analysis phase, and the reporting phase (Johnson et al., 2020). The interviews were transcribed, summarized, and presented to the participants to ensure accuracy and to provide transparency.

Based on the Walden University DBA Consulting Capstone guidelines, it is imperative that researchers adhere to the directions for conducting research, which include discussing informed consent, research withdrawals, incentives, ethical protection, data collection and safety, IRB approval, potential information exclusion, and any other potential situations with the research participants involved in the study. Inclusion of an interview protocol for this study encouraged transparency for the client organization leaders (Appendix A).

Data Organization Techniques

Obtaining and analyzing an organization's documents could potentially reduce ethical concerns that may be associated with qualitative methods, and it may also reduce the potential for failures in technological approaches such as video conferencing (Morgan, 2022). Before I engaged in the analysis of the data, I organized the data I obtained. Due to the raw and immense nature of the collected qualitative data, researchers must perform organization techniques to interpret and convey the data in a comprehensive manner (Sawatsky et al., 2019). The Walden University DBA Consulting Capstone rubric and the Baldrige Excellence Framework were my guide when engaging in the collection and organization of data for this research study. I developed a transcription based on the responses from the interview with the participants and I created a reflective journal. Reflective journaling allows the researcher to self-reflect on the experience (Artioli et al., 2021). Coding is another form of organization of data for analysis. Coding allows the researcher to convert the raw data into a logical format (Mezmir, 2020). I utilized Microsoft Excel to code all the data and identified the patterns and major themes, and ensure alignment between the themes, patterns, my research question, and the conceptual framework used in the study.

I ensured that all electronic documents and any information associated to the client organization were on a password protected hard drive. I stored the physical document and items associated with the client organization and the research study in a locked area as well. Ethical principles should be conveyed and understood to ensure protection of the participant and to maintain confidentiality (Taquette & Borges da Matta Souza, 2022). The data, both physical and digital, will remain stored and undergo protective measures for the minimum period of 5 years. After 5 years, I will engage in the destruction of the digital files by permanent deletion, and the nondigital items by shredding or other secured destructive means.

Data Analysis

I served as the main data collection instrument for this qualitative single case study. I acquired research data from semistructured interviews, documents, web, and social media platforms. Qualitative research study commonly utilizes triangulation to enlist a variety of data sources (Mtisi, 2022). Triangulation can aid in ensuring validity and reliability of research by gathering data from various sources with a focused approach (FitzPatrick, 2019). I obtained the interview data from the client organization leaders and the company financials, by-laws, board of directors' roster, organization events, minutes from board and committee meetings, strategic plan, website, other associated websites, membership application, and social media posts and responses. I cross referenced the collected data to establish themes. I employed methodological triangulation to enhance my view of the experience and to corroborate my research study.

Qualitative data converts raw data into comprehendible and useful information that is helpful in corroboration (Mezmir, 2020). Grounded theory, content, and thematic analytic are types of exiting data analytical strategies (Abrams et al., 2020). Coding is a form of data analytics that results in data reduction (Mezmir, 2020). Coding allows the researcher to organize the data to provide an understanding of the data, and there may be repetition of codes during the coding process, which provides an indication of patterns (Mezmir, 2020). Coding can be done electronically by designated software or manually by using Microsoft Word or Microsoft Excel. In the search for themes and patterns, researchers would review all data carefully and manually record the themes or identify patterns if using manual coding (Williams & Moser, 2019). The overall results from coding are to eliminate potential bias and threats to the validity of the research study.

Yin (2018) was a guide during the data analysis process. First, the interview questions were in collaboration with the research study question. I performed the transcription of the participants' interviews in Microsoft Word and used Microsoft Excel adjacent to record the themes and patterns into columns. I searched through the transcription for commonality, whether in keywords or phrases. I used Microsoft Excel to color code the themes and correlated the themes to the remainder of the study and other data (see Yin, 2018). The code coding helped me to organize further into primary and secondary themes (Mtisi, 2022). The search expanded to all the collected data, which gave me an idea of other themes that may require further research. The alignment of the key themes to the literature, conceptual framework, and the Baldrige Framework of Excellence criteria was the final step.

Reliability and Validity

Establishing the reliability and validity of research are essential components of determining the quality of that research. Validity usually confirms the tools, and reliability confirms the trustworthiness of the process involved (Mohajan, 2017). Reliability and validity highlight the transparency of the researcher and eliminates any potential researcher bias (Mohajan, 2017). Research quality also extends and corresponds with dependability, transferability, and confirmability (Laumann, 2020). FitzPatrick (2019) conveyed that triangulation, addressing disconfirming evidence and alternate explanations, member checking, reflexivity, and prolonged engagement are among the methods used to test research quality and could essentially contribute to reliability and validity of the research.

Reliability

Reliability of the research study is essential to the researcher by adding to the quality of the researcher’s work and the competency of the research performed. Reliability checks the utilization of the methods of data collection to ensure quality output (Rose & Johnson, 2020). Dependability ensures that the researcher gives an extensive description of the research study process, which encourages replicability of the research study (Johnson et al., 2020). I transcribed the semistructured interviews verbatim, summarized the key points, and performed manual coding to identify common themes and patterns. The clarification or elaboration done during member checking determine the quality of the research (Busetto et al., 2020). Janis (2022) also proposed triangulation to determine dependability. I used member checking to corroborate the findings. I received confirmation and acceptance of the interview transcripts, summaries, and interpretations from the participants via phone. I was able to achieve triangulation by using various data sources for my research study.

Validity

Hayashi et al. (2019) noted that there is difficulty when associating validity in research with qualitative research. Validity in qualitative research is also essential to prove the quality of the research and the competency of the researcher. FitzPatrick (2019) emphasized the parallel meaning of validity and trustworthiness. Coleman (2022) recommended scrutinizing the data by utilizing the rich data method which includes recording the interview with a recording device and analyzing the obtained verbatim data. Ensuring triangulation in the research study helped to ensure validity, therefore obtaining data from multiple sources, and analyzing those findings. Motulsky (2021) expressed the need to include member checking when addressing the validity of research. Credibility, transferability, confirmability, and data saturation eliminate any potential risks to research quality (FitzPatrick, 2019; Yin, 2018). Next, I will discuss the practices I deployed to ensure my research's credibility.

Credibility

My research study employed practices that encouraged credibility. I obtained the audio recording of the participants' interviews and conducted transcription of the interview, which produced themes and patterns. Triangulation can reduce research bias and encourage research credibility (FitzPatrick, 2019). I utilized various data collection methods, such as documents, web, and social media platform to ensure data triangulation. Member checking presents the data and interpretations to someone else for review and is a strategy for achieving credibility (FitzPatrick, 2019). Member checking involves ensuring clarity of information and granting the opportunity to expound on the data (Busetto et al., 2020). I utilized member checking to corroborate the findings. I received confirmation and acceptance of the interview transcripts, summaries, and interpretations from the participants via phone.

Transferability

FitzPatrick (2019) proposed that transferability may have similarities to generalizability. Singh et al. (2021) revealed that generalization may be difficult but incorporating triangulation is a solution. My research study employed strategies of transferability. I conducted and transcribed semistructured interviews and provided the interview protocol (Appendix A). I also followed the guidelines of conducting a qualitative single case study and the guidelines of assessing the organization with the Baldrige Excellence Framework. I achieved data saturation because of repetitive themes and codes within my analysis. The process I used in my data analysis aligned with the process advocated by Braun and Clarke (2021).

Confirmability

My study employed strategies of confirmability. Confirmability provides the neutrality to ensure that confirmation is possible for the obtained data (McGinley et al., 2021). I conducted and transcribed semistructured interviews and performed the strategic approach of coding to identify themes and patterns from the obtained data. I also used multiple methods to obtain data; I used web and social media platforms, semistructured interviews, and documents, and I was able to achieve data saturation. The clarification or elaboration done during member checking determines the quality of the research (Busetto et al., 2020). I worked with the participant to execute member checking. I received confirmation and acceptance of the interview transcripts, summaries, and interpretations from the participants via phone.

Data Saturation

Data saturation occurs when the researcher exhausts all data collection and analysis methods (Johnson et al., 2020). When determining the sample size, data saturation may impact the outcome (Renjith et al., 2021). McGinley et al. (2021) rebutted the claim of the connection between data saturation and sample size and professed that data saturation allows the researcher to achieve their findings during the analysis process. I achieved data saturation in my research study by obtaining extensive information from the client leader organization on their diverse member recruitment strategies through semistructured interviews, organizational data, and web-based platforms. The questions ensured that there was the exhaustion of all potential answers. I triangulated the data from the interviews, documents, web, and social platforms. I exhausted this process to the extent that no new or additional information was identified.

Transition and Summary

Section 2 consisted of the purpose of the study, the role of the researcher, the research method and design, overview of the participants along with the population and sampling, overview of ethical research, the data collection instruments, technique, and the data organization technique, data analysis, and the reliability and validity of the research study.

As described in Section 2, I completed three telephone interviews with three participants of the small nonprofit organization in eastern United States. The interviews aimed to explore the strategies the executive team used to recruit and retain diverse members. I achieved data saturation and received access to the organization's documents and information by the organization's leadership team.

I ensured that all documents were secure in the form of electronic data files with password protection. I utilized methodological triangulation to ensure a careful analysis of the documents. I used other sources, such as GuideStar and the Internal Revenue Service (IRS) financial reports, organizational documents and files, and web and social media platforms, to ensure objectivity and a broad perspective on factors about the nonprofit organization's performance. I shared the results of the data analysis with the executive team, which aided in member checking and confirmed the validity of my analysis of the presented data.

The 2019-2020 Baldrige Performance Excellence Program (2019) provided the core concepts for the interview questions, which were part of the data collection process for this research study. The 2019-2020 Baldrige Excellence Framework provided an outline for researchers to assess the organization's strengths and improvement opportunities (Baldrige Performance Excellence Program, 2019). Section 3 covers the organizational profile of LMN and contains a detailed analysis of its (a) leadership; (b) strategy; (c) customers; (d) measurement, analysis, and knowledge management; (e) workforce; (f) operations; and (g) results. Section 3 includes the findings from the study, an executive summary of the key themes, the project summary, the contributions of this study, and recommendations for future research.

Section 3: Application to Professional Practice and Implications for Change

Introduction

The objective of this qualitative single case study was to explore the strategies of nonprofit organization leaders to recruit and retain diverse members. The incorporates the Baldrige Excellence Framework as the paradigm for viable organizational advancements. Researchers use the criteria and scoring system associated with the Baldrige Excellence Framework to assess organizational performance, which includes an exploration of strengths and opportunities across seven categories: (a) leadership; (b) strategy; (c) customers; (d) measurements, analysis, and knowledge management; (e) workforce; (f) operations; and (g) results (Baldrige Performance Excellence Program, 2019). Many of the elements associated with the Baldrige Excellence Framework are essential for organizational leaders to identify and implement effective recruitment and retention strategies (Jankalová & Jankal, 2020). Overall, the seven categories of the Baldrige Excellence Framework assist organizational leaders in assessing the strengths of their organization and identifying potential opportunities provided by diverse recruitment and retention of members.

In the Walden University DBA program consulting capstone, researchers analyze and evaluate the client organization across the seven categories of the Baldrige Excellence Framework and provide applicable feedback and analysis to the client leaders that is directed at addressing the client leaders' stated business problem. For 50 years, LMN, a 501(c)(3) nonprofit organization, has engaged in historical preservation in the eastern United States. Using the CMMT, I identified key themes and opportunities the leaders of LMN can incorporate into their organizational strategic plan. I engaged in the data collection and analysis process, coded the data, and confirmed the reliability and validity of the data. Two primary themes emerged from the thematic analysis of the collected data: (a) recognition and understanding and (b) marketing strategies to diversify membership.

Key Factors Worksheet

Organizational Description

LMN is a 501(c)(3) nonprofit organization based in the eastern United States that sought to build its membership base by recruiting and retaining diverse members. LMN promotes an understanding of history, architecture, and culture through educational programs, exhibits, historical publications, and public events centered on historic buildings. These programs ultimately coalesce into special initiatives for the acquisition, restoration, and preservation of historic sites, buildings, documents, and other artifacts related to the organization's home city. LMN's headquarters is a nationally registered historic building in the same city. Two organizations with similar objectives consolidated to form LMN. For over 50 years, LMN has acquired, restored, and preserved multiple historic sites and buildings to promote residents' engagement with their city's history.

LMN is a very small organization with only one paid staff person, the executive director. LMN also has a volunteer administrative assistant and a governing board of directors. The executive director of LMN furthers the organization's objectives by working with the board of directors, community members, and outside organizations. LMN's executive director promotes a better understanding of the city's history, architecture, and culture by designing presentations, educational programs, exhibits, and producing historical publications. LMN is a membership-based organization, and the executive director is actively engaged in recruitment and retention efforts. The leaders of LMN encourage collaboration among similar organizations and do not see similar organizations as competitors.

Organizational Environment

Product Offerings. The product offerings of the LMN include (a) educational programming, (b) exhibits, (c) historical publications, (d) acquisition, (e) restoration, and (f) preservation. LMN offers five events annually that are open to the community: There is usually a seasonal spring event, a summer event, an autumn or Halloween event, a Christmas event, and a holiday season event. These five events cater to different groups of people within the community. Several events are family-friendly, while the others focus on a mature audience. The ticket prices are reasonable for each event.

LMN's executive director offers educational programs to local universities about the history of the organization. The executive director uses this approach to spark a younger audience's interest in LMN membership. The executive director also curates exhibits on historic, restored, and preserved properties. As part of their membership, community members are given the option of becoming a preservationist. The executive director and the board of directors identify historical buildings and locations within the city and then attempt and acquire access to these properties whether through purchase, donation, or permission of the owners for temporary use. Additionally, LMN restores properties to their original time period, using minimal additives and period appropriate materials to ensure preservation. After the acquisition, restoration, and preservation process is complete, the sites and buildings are opened to the public as exhibits. LMN then hosts its annual events and fundraising activities at these historic sites or in these restored buildings.

Mission, Vision, and Values. LMN's goal of diversifying its membership base correlates with its mission, vision, and values. LMN's mission and vision highlights the need to engage in activities to acquire, restore, and preserve historical aspects related to the city. LMN's organizational values follow from the principles of its guiding mission and vision and are built into the activities and practices of LMN:

- Preserve and restore historic structures in the LMN's location.
- Ensure that future generations can experience the city's rich history and culture.
- Improve the LMN's home city by revitalizing the area and attracting new businesses.
- Encourage job creation that could boost the economy.
- Promote sustainable development and encourage the use of renewable energy sources.
- Support other organizations and the arts and cultural activities of the city.
- Strive to build a brighter future for ALL residents of LMN's home city.

Workforce Profile. LMN's workforce comprises one paid staff member who normally works 3 days a week for a total of 25 hours. The staff member works additional hours, when necessary, during the organization's annual events. The organization also has a volunteer staff position that acts as an administrative assistant for the organization. The other people associated with the organization are the 14 members on its board of directors. Board members assist with events and attend monthly board meetings. The organization also depends on the help of volunteers to assist with events. Members of LMS's workforce possess, at minimum, an undergraduate degree, and they all share a passion for the organization's work. Table 2 provides an overview of the team that ensures the daily activities of LMN are carried out effectively and efficiently.

Table 2

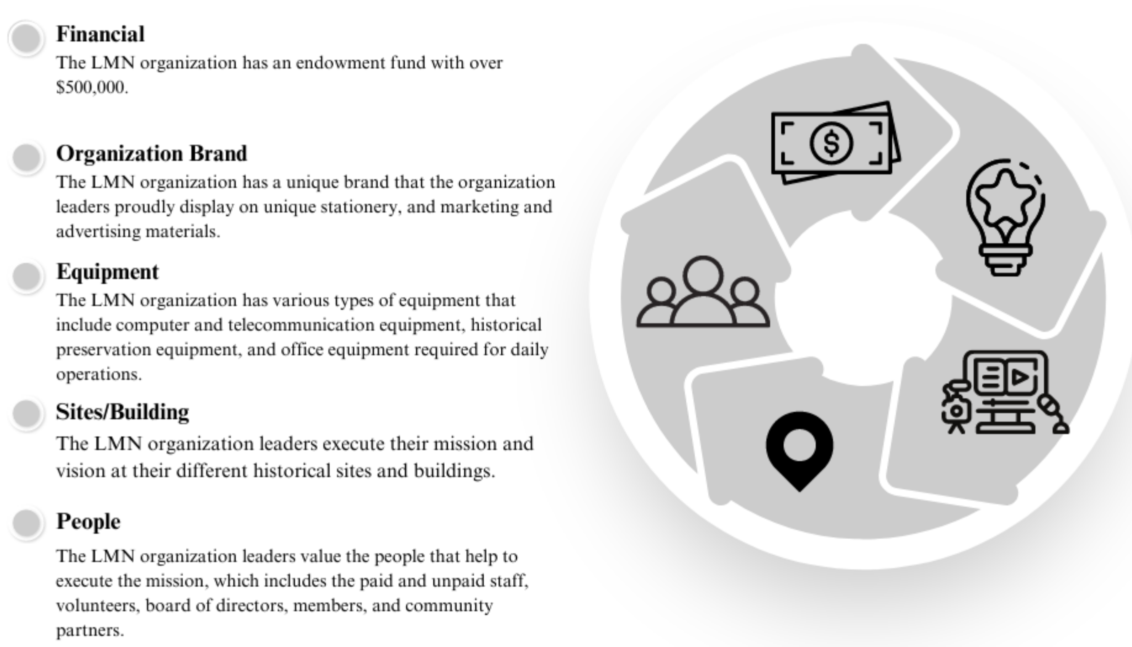
LMN Organization Workforce Profile

Positions	Responsibilities	Education
Executive director (paid staff)	Overall operations of the organization, including accounting, planning, and marketing.	Undergraduate degree
Administrative assistant (unpaid staff)	Assist with the operations of the organization.	Undergraduate degree
Volunteers	Assist with organizational events.	Variety of educational backgrounds.
Board of directors	Oversee the overall organization and serve as the advising party to the executive director.	Undergraduate degree Graduate degree Postgraduate degree

Assets. LMN owns some of the historical sites and buildings they preserve. Their total assets are about $600,000**,** as of their most recent IRS 990 filing. To ensure a smooth workflow in the completion of organizational tasks, LMN's assets include physical and technological equipment, computers, printers, and a telephone system. The organization's main office is furnished, and their historical sites include many historical and cultural artifacts. The organization also has an endowment. LMN's primary assets constitute five categories: (a) financial, (b) organization brand, (c) equipment, (d) sites and buildings, and (e) people. Figure 1 graphically presents the primary assets of LMN and the specific asset categories.

Figure 1

LMN's Primary Assets



LMN 's executive director, administrative assistant, and board of directors are knowledgeable regarding its operation. The workforce team associated with LMN is passionate about its cause, and they are familiar with each other and their community. However, LMN struggles to find consistent volunteers and new members for the organization. Membership is important to LMN because members share a common passion and knowledge of the city's history.

LMN does not effectively use its website and social media platforms as a marketing tool. Properly deployed, these could become an asset for the organization. LMN's website and social media platforms often provide inconsistent or conflicting information. Though LMN makes poor use of its digital platforms, the organization does well with traditional or print media. LMN takes pride in developing exquisite stationery and sends promotional and organizational information on its own letterhead designed to resemble correspondence from various historical periods.

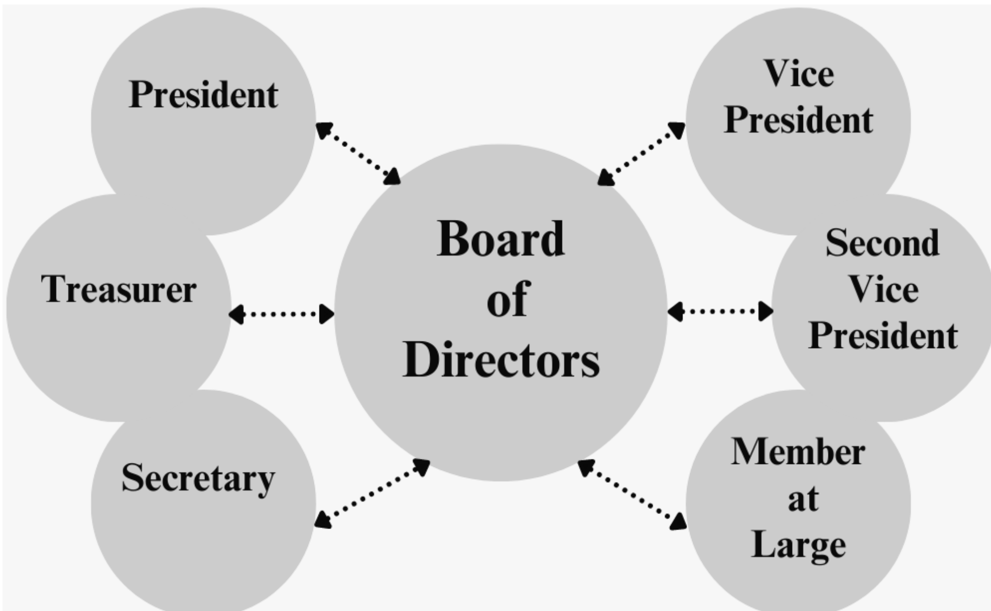
Regulatory Requirements. LMN is a 501(c)(3) nonprofit organization in accordance with United States Code and IRS regulation. The IRS sets forth governing practices and procedures for nonprofit organizations (Internal Revenue Service, 2018). LMN must comply with IRS regulations to remain active and receive the benefits of its 501(c)(3) nonprofit organization status. The organization must also comply with policies and procedures outlined by the state where it is located and registered as well as the Office of Charitable and Regulatory Programs for nonprofit organizations of that state. The organization's home state establishes regulations and procedures for the incorporation of the 501(c)(3) nonprofit organizations within its borders and the specific requirements for an organization's board of directors, officers, and members. In LMN's location, state law mandates the reporting of any organizational changes to the commissioner. LMN must also adhere to federal and state Occupational Safety and Health Administration (OSHA) regulations, policies, and procedures. The nature of LMN's work also requires it to comply with the state housing authority and Real Estate Board.

Organizational Relationships

Organizational Structure. The organizational structure of LMN is rare for a nonprofit organization that has been in existence for a similar amount of time. LMN does not any have full-time paid positions; instead, LMN has one paid staff person who serves as the executive director and works part-time for about 25 hours each week. On occasion, the executive director will work additional hours to attend or promote events on behalf of the organization. The organization's other staff person is an unpaid administrative assistant and works approximately the same hours as its executive director. The board of directors for LMN serves as its oversight authority and promotes transparency within the organization. They also engage with the community as volunteers during the organization's annual events. The organization has some additional volunteers but nothing structured. Figure 2 shows the composition of the board of directors.

Figure 2

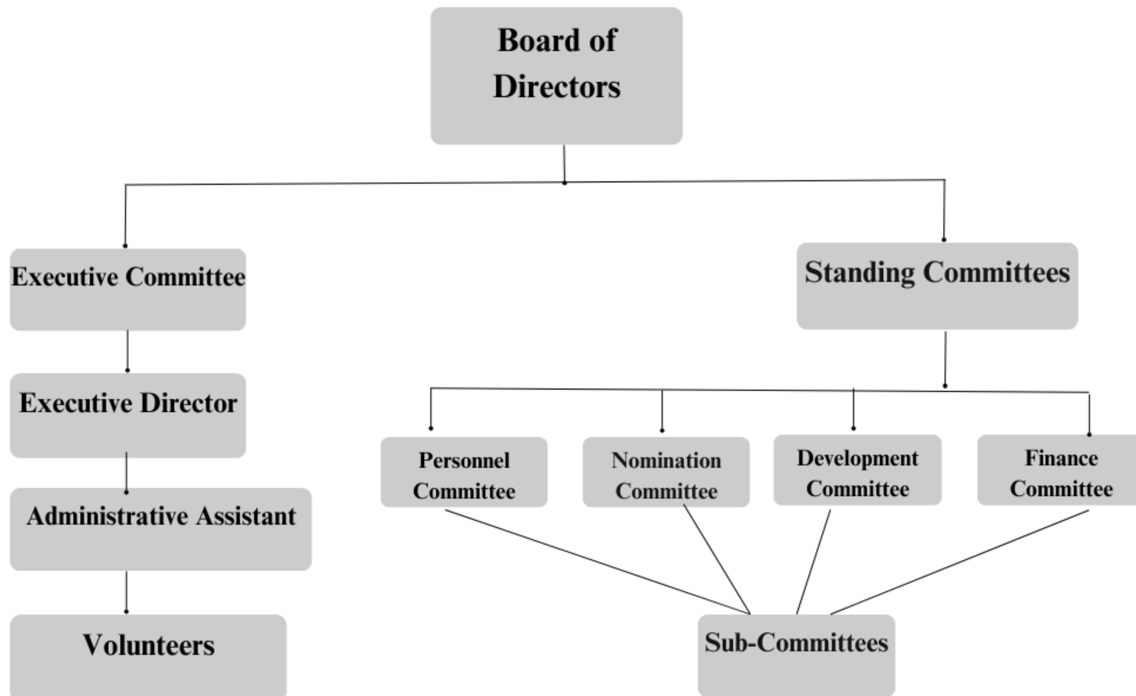
LMN's Board of Directors



The administrative assistant for LMN reports to the executive director. The executive director ensures that the organization follows the necessary procedures and policies. The executive director reports to the board of directors and is also a nonvoting member of the board during meetings. Figure 3 is a depiction of the organizational structure.

Figure 3

LMN's Organizational Structure



The executive director of LMN is part of the Executive Committee, which includes the organization's officers, its immediate past president, the chairperson of the finance committee, and the member at large. The Executive Committee deputizes its board of directors in scenarios requiring expeditious action in between meetings. A chairperson is appointed to each standing committee by the president. The Finance Committee and the Development Committee are responsible for ensuring the sustainability of the organization. The Finance Committee finalizes the annual budget for the organization, and the Development Committee covers membership, volunteers, media and promotion, and the upkeep of buildings and grounds as well as designates the recipients of any awards. The committee chairpersons, including financially contributing nondirectors, have the power to create subcommittees.

Membership. LMN is a membership-based organization, which means that the organization generates a portion of its revenue from annual dues paid by each member. LMN offers four different types of membership: (a) student member, (b) regular member, (c) sustaining member, and (d) life member. The board of directors designates the membership types and sets the corresponding membership dues. All paying members are entitled to vote on organizational business. LMN's leaders have struggled to diversify the membership base, and despite working collaboratively, the executive director and board of directors have struggled to develop effective strategies to recruit and retain diverse members. LMN does not obtain demographic data, such as (a) race/ethnicity, (b) gender, or (c) age, from their membership forms. Although the organization remains unaware of the demographic diversity in its present membership because it fails to collect this information from its members as part of their registration, LMN offers affordable options for student and regular memberships.

Diversity. LMN has boilerplate language about accepting diversity and diverse groups in its bylaws; however, no diversity statement appears on the organization's website or social media accounts. Still, LMN states that it would like to have a more diverse membership base. The median age of LMN's leadership team is 42 years old, while the median age of the population in LMN's home city is 29 years old. Figure 4 shows a comparison, by gender, of LMN's leadership team and the city. Figure 5 depicts the racial and ethnic composition LMN’s leadership team compared with that of the organization’s home city.

Figure 4

Gender Comparison Between LMN and LMN’s City

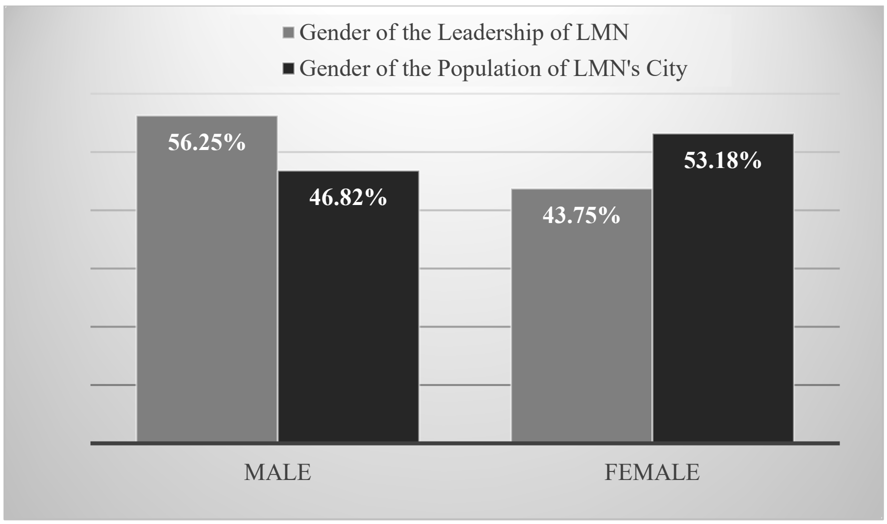
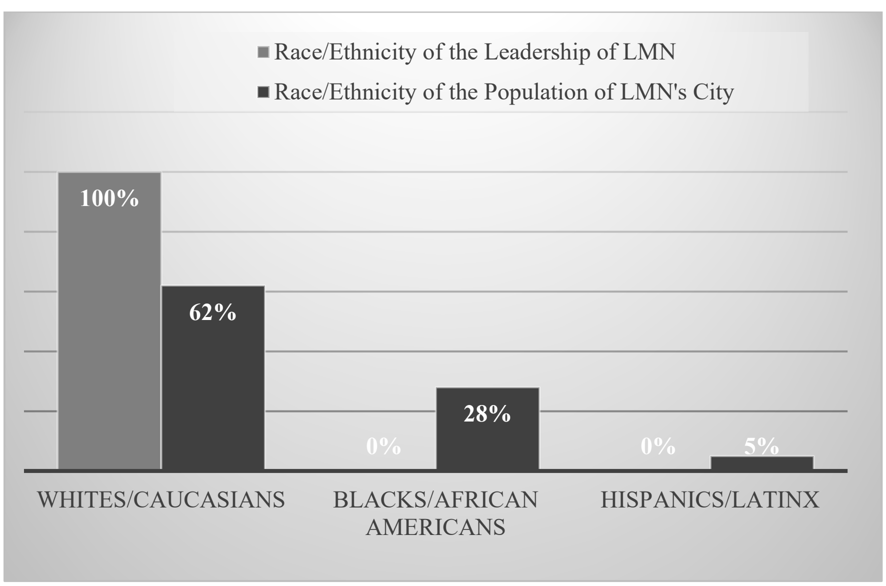


Figure 5

Race and Ethnicity Comparison Between LMN and LMN’s City



Customers and Stakeholders. The stakeholders and customers associated with LMN include: (a) the board of directors, (b) members, (c) donors, (d) community organizations with common goals, (e) community members with common goals, (f) volunteers, (g) real estate agents. The organization prioritizes working with community organizations and community members with shared goals and values. Table 3 shows how the customers and stakeholders are directly involved, or indirectly involved, with the execution of LMN's mission, vision, and values. LMN hosts events and educational programming to engage with its customers and stakeholders. The customers and stakeholders that LMN works with represent the diverse population in the organization's home city. Effectively engaging with customers and stakeholders provides opportunities for LMN to strengthen current customer and stakeholder relationships and create new and lasting customer and stakeholder relationships. The events and educational opportunities offered by the organization are tailored to meet its audience. LMN executes events for children, families, adults, and older adults.

Table 3

Involvement in LMN's Mission, Vision, Values

Customers and stakeholders	Directly involved	Indirectly involved
Board of directors	*	
Members	*	
Donors		*
Community organizations		*
Community members		*
Volunteers	*	
Real Estate Agents	*	

Suppliers and Partners. LMN has created strong partnerships with community organizations, groups, and individuals to strengthen the mission, vision, and values of the organization. The collaborative efforts of the organization have many community members' support. These collaborations grant the organization exposure, which further aids in developing the strong relationships needed for recruitment and retention of members, donors, and volunteers. LMN is always looking to expand its supplier and partner list. The board of directors and the executive director of LMN constantly seek to collaborate with organizations in the community, especially organizations with similar missions and visions.

LMN's three primary suppliers and partners are the people living in historic homes or communities, marketing and advertising companies, and goods and service suppliers. The people living in historic homes or in historic communities provide opportunities for the organization to use their homes or sites as historical exhibits. During the COVID-19 pandemic, some of the homeowners in historical homes did not want to entertain guests. Using the different homes as exhibits allows LMN to extend and enhance their services and also serves as a method of recruiting potential members. The organization’s marketing and advertising companies provide the organization’s unique branding. LMN leaders are conscious of effective branding in their marketing strategy. They understand that marketing and advertising are essential components in the recruitment and retention of members. The goods and services suppliers provide LMN with items needed for the organization’s functionality and items needed for executing its mission and vision. Figure 6 shows the connection between key suppliers and partners and the execution of the mission and vision of the organization.

Figure 6

LMN's Key Suppliers and Partners' Relationship

Organizational Situation

The purpose of this qualitative single case study was to explore strategies for nonprofit organization leaders to recruit and retain diverse members. The target population for this study was the executive leadership of a single nonprofit organization in the Eastern United States that attempted to implement strategies to recruit and retain diverse members to promote the organization's sustainability. The data obtained during this study outlined the recruitment and retention strategies employed by the organization. The data were then compared with the current population and membership of the organization to develop and strengthen recruitment strategies to further organizational goals and encourage organizational sustainability. LMN's leaders use different events and educational programs to connect with the community. This builds long-term trust and strengthens the mission, vision, and values of the organization. The organization's leaders understand that their current members and leaders do not represent the population of the city in which the organization is located. The organizational leaders would like to increase their organizational diversity and reach a younger, more female, and more racially and ethnically diverse audience.

Competitive Environment

Competitive Position. LMN is part of the competitive environment of nonprofit organizations with similar or non-similar missions, visions, and values. The organization has indirect competitors, such as other nonprofit organizations seeking funding from similar sources. The organization has a competitive advantage in its environment because of the rich history of the organization's location. The historical significance of its location provides LMN an advantage over other nonprofits competing for funding, as tourism in the area largely arises from its historic and unique architecture, and funding organizations view its preservation as integral to the city's economic health. LMN collaborates with similar organizations and was founded as the result of a merger between similar organizations.

Competitiveness Changes. The COVID-19 pandemic and the possibility of upgraded renovations in LMN's location are changes that affect the organization. The COVID-19 pandemic caused a halt in the organization leaders' ability to execute their mission effectively. The organization leaders were unable to schedule and execute fundraising events or their annual program. The organizational leaders had to move their traditional way of marketing into an unfamiliar space. During this time, LMN was also unable to schedule any exhibits or tours of historical homes. LMN's home city is rapidly growing and faces the potential for new commercial and residential development financed by outside corporations. Erecting new structures, particularly if existing historical buildings which have yet to be officially listed are displaced or demolished, would prove detrimental to the organization's mission.

Comparative Data. LMN does not engage in any form of tracking and comparative data collection with similar organizations. LMN leaders collaborate with organizations in their region with similar missions. The organization's collaborative efforts help to expand awareness and, ultimately, could provide a strategy for membership recruitment and retention. LMN's location, however, provides its purpose and reason for existence as the preservation of the city's historic architecture is essential to its continued sustainability.

Strategic Context

LMN struggles with marketing and, more specifically, with marketing to a diverse audience. The organizational leaders understand that they need to have a diverse membership base, especially in the areas of age and race/ethnicity. The organization's leaders lack marketing skills and knowledge of how to market to a diverse audience. The organizational leaders understand that a more diverse membership base would provide inertia for continued increases in the diversity of their membership and could potentially encourage collaborations with other, more diverse, organizations. LMN's leaders face a stagnant membership recruitment and retention rate because of their ineffective marketing strategies and an unwillingness to try new things.

Though these challenges exist, LMN's leaders employ strategies to mitigate them and leverage the connection with the city and the organization's mission, vision, and values. Having a strong support system and a reputable brand can help the organization gain the recognition needed. The organization's leaders attempt to connect their brand to the historical elements of the city. Additionally, the leadership team hosts the same annual events each year and resists creating new events that would be more relevant to potential and more diverse members. Table 4 outlines the strategic conditions for the LMN organization's focus areas.

Table 4

Strategic Conditions for LMN's Focus Areas

Focus areas	Strategic challenges	Strategic advantages
Diverse marketing strategies	• Leaders lack knowledge and skills of the different types of marketing strategies and how to use them.	• Rich history in the organization's location with a community that aligns and supports the mission. • The organization has 50 years of experience in the field with a unique and exquisite brand.
Membership recruitment and retention	• Lacks innovative ideas incorporated in their marketing strategy.	• Alternating the offered events so that it appears as something new and exciting.

Performance Improvement System

LMN holds monthly board and committee meetings that allow the leadership team to review the outcome of their strategic efforts and consider their alignment with the mission, vision, and values of the organization. Membership recruitment and retention are usually the highlights of board and committee meetings, as the organization depends on members and membership dues. The board also plans future events and reviews their organization's financials at each meeting. The leadership team keeps the committee and board meeting minutes. The organization holds an annual meeting which involves all members of the organization as well as the leadership team. The annual meeting allows the members to voice their compliments and any of their concerns. There is no formalized method for assessing the performance of LMN.

Leadership Triad: Leadership, Strategy, and Customers

The Baldrige Excellence Framework's Leadership Triad reviews the connection between leadership, strategy, and customers. A focus on strategy and customers, from a leadership perspective, relates to significant organizational achievement and organizational results (Baldrige Performance Excellence Program, 2019). The strategic level leadership team in organizations examines external factors, such as their customers, when developing strategy (Baran & Woznyj, 2020). Therefore, the leadership team in organizations implements a program of effective and efficient strategic development it directly benefits its customers.

Leadership

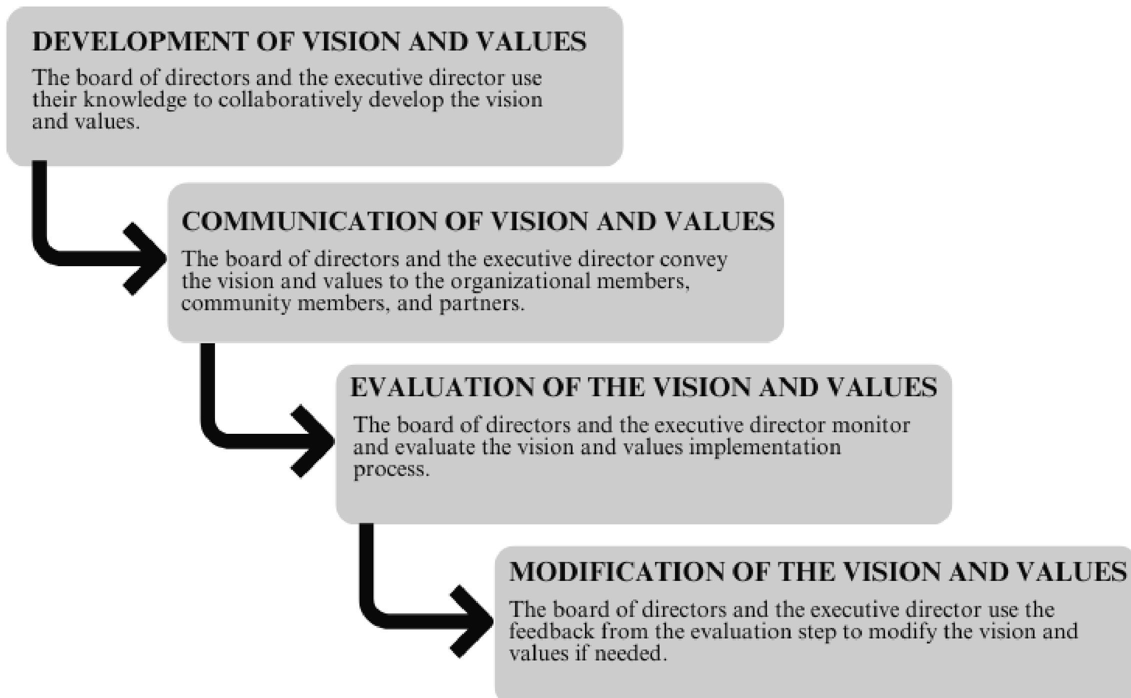
Senior Leadership

LMN's senior leadership team comprises the executive director and the 14 members of its board of directors. The senior leadership team is knowledgeable and has expertise in the industry. The senior leadership team has a broad knowledge base that ensures the functionality and sustainability of the organization. The senior leadership of LMN serves as the organization's guide by aligning the vision, values, goals, and activities of the organization. The senior leadership of the organization share the vision, values, and goals of the organization and can best focus the organization's activities to meet its goals and their clientele's demands.

Vision and Values. The leadership of LMN develops the organization's vision and values. Figure 7 describes the process of organizational vision and value development by the organization leaders. The board of directors and the executive director combine their knowledge to develop the organization's vision and values. The board of directors and the executive director simultaneously work to implement the organization's vision and values. The leadership of LMN conveys the vision and values of the organization to organizational members, community members, and partners. The board of directors and the executive director monitor and evaluate the achievement and cohesiveness of the organization's vision and values. The organization leaders also make changes depending on the feedback from the execution of the vision and values. The organization leaders set the vision and values based on the organization's overall purpose and clientele.

Figure 7

LMN's Process for Setting Vision and Values



Legal and Ethical Behavior. The leadership team of LMN demonstrates its dedication to legal and ethical behavior through its actions. The board of directors and the executive director work together to maintain compliance with IRS regulations as a 501(c)(3) nonprofit organization. One of the organization's board of directors is a retired lawyer who helps ensure strict legal and regulatory compliance. The leaders of LMN are committed to abiding by all legal and regulatory requirements to fulfill the organization's purpose. Based on the organization's actions and the words of its leadership team, LMN demonstrates a commitment to legal and ethical operation.

Communication. LMN's leaders communicate with their internal and external stakeholders using different methods. LMN's internal stakeholders include the executive director, the board of directors, and the administrative assistant. The external stakeholders include volunteers, community partners, community members, and organizational members. The organizational leaders regularly use face-to-face interaction to communicate with internal stakeholders because of their relationship and the proximity of their residences. During the COVID-19 pandemic, the leadership of LMN decided to try a different method to abide by COVID-19 protocols. The leadership of LMN employed Zoom for their monthly board and committee meetings and increased their use of emails and phone calls. LMN's organizational leaders meet monthly, and the organization holds an annual meeting that extends beyond the board of directors and the executive director to include all due paying members. LMN uses print mailings to communicate with its external stakeholders, organizational members, community members, and community partners. The leadership of LMN also employs email and social media to communicate with their external stakeholders. Although the organizational leaders of LMN employ social media to communicate with their external stakeholders, the frequency of this communication is very low. The organizational leaders struggle to convey their vision and values to external stakeholders through social media. LMN's leaders prefer a more traditional method of communication and believe that a more traditional method of communication aligns best with the organization's image, purpose, and their ability to implement their vision and values. Table 5 describes the communication method and frequency for the specific stakeholders of LMN.

Table 5

LMN's Communication Chart

Stakeholder	Method	Frequency
Internal		
Board of directors	Face-to-face, phone calls, emails, Zoom	Monthly, at events, or as needed
Executive director	Face-to-face, phone calls, emails, Zoom	Monthly, at events, or as needed
Administrative assistant	Face-to-face, phone calls, emails	Three weekdays/weekly, at events, or as needed
External		
Volunteers	Face-to-face, emails, social media, website, phone calls	As needed or at events
Organizational members	Face-to-Face, postal letters, emails, social media, website, phone calls	As needed or at events
Community partners	Face-to-face, postal letters, emails, social media, website, phone calls	As needed or at events
Community members	Face-to-face, postal letters, emails, social media, website, phone calls	As needed or at events.

Creating an Environment for Success. LMN's leadership emphasizes the significance of producing an environment that promotes success. Members are an integral part of LMN's achievements. Current members, potential members, and past members help with the organization's growth. An increased membership base that represents a diverse group across age, gender, and racial/ethnic identity is essential for the long-term success LMN and its organizational leaders. LMN's organizational leaders struggle to recruit a diverse membership base, but the leaders acknowledge the importance of diversity in their organization. Continuing success for LMN's organizational leaders will also require increasing the organization's membership. LMN's leaders also think that their current members feel comfortable engaging with the organization's purpose. LMN is a membership-based organization and memberships provide the financial foundation for the organization that allows for its future success.

Creating a Focus on Action. LMN's leadership highlights action in carrying out and achieving the organization's mission. LMN's leadership team uses the different committees to engage with aspects that affect the organization's success, such as finance, nominations, development, and personnel committees. The board of directors and the executive director work together through committees to realize the organization's mission. Delegating the different elements that contribute to the organization's mission, such as membership, marketing, and advertising, financial, and fund development, creates a seamless integration of action.

Governance and Societal Responsibilities

This section outlines the system of governance, performance evaluation, legal and ethical behavior, societal well-being, and community support for the organization. The leadership of LMN impartially communicated these governance and societal liabilities and their relation to the organization's successes and downfalls.

System of Governance. LMN's board of directors and executive director are parallel to the system of governance. The general members elect the board of directors during the organization's annual meeting. The board of directors comprises 12 to 15 directors, which include the president, vice president, second vice president, secretary, and treasurer. The board of directors serves for 3 years and may be reelected for two consecutive terms. The board of directors does not receive compensation. The only paid staff at LMN is the executive director. The board of directors selects the executive director after conducting interviews and reviewing candidates' professional and educational backgrounds. The board of directors and the executive director are individuals with professional backgrounds, at least an undergraduate degree, nonprofit management experience, and expertise. Their roles are crucial to the governance of the organization. LMN also has committees and subcommittees that allow for delegating important organizational tasks related to the execution of their mission, vision, and values. The board of directors holds monthly meetings, and there are also monthly committee meetings. The executive director is present during both board and committee meetings as a non voting member. The executive director contributes to the board and committee meetings by presenting an overview of the organization's successes and failures in achieving its mission. The executive director also uses the board and committee meetings to make requests or suggestions, which the board of directors then votes for or against. Committee meetings are generally used to plan for specific engagements that influence the execution of the mission. After the committees meet, they present their plans to the board for the purpose of voting and then implementation. The executive director manages the daily governance of the organization based on the directives given by the board of directors. The administrative assistant helps the executive director with the daily governance of the organization and the execution of the organization's mission. The executive director has a clear governance structure to provide direction to the administrative assistant and the volunteers. The relationship between the leadership team works well and allows for feedback and discussion on matters pertaining to the organization's successful execution of its mission, vision, and values. Although LMN follows a formal governance structure, the board of directors and the executive director are familiar with each other and express their comfort by being honest in communicating requests and praises.

Performance Evaluation. The by-laws of LMN outline the duties of the personnel committee, which include completing annual job performances for paid staff and making recommendations about employment at the organization. This is LMN's only outlined and formal performance evaluation. The leadership of LMN engages in informal performance evaluations such as reviewing the membership quota for the organization, reviewing the funds obtained from fundraising events, and reviewing the marketing and advertising campaigns of the organization. The board of directors and the executive directors engage in these informal evaluation activities. The informal evaluation activities encourage discussion, which identifies flaws in execution, and makes recommendations for changes to promote success. The leadership of LMN is comfortable with the current structure of using formal and informal evaluation processes. The current structure encourages flexibility in addressing matters.

Legal and Ethical Behavior. Compliance with legal and regulatory requirements is crucial to the operation of LMN. Members of the board of directors with legal backgrounds provide oversight of the legalities involved in operating the nonprofit organization. The executive director ensures the filing of the IRS Form 990 at the end of the organization's fiscal year, which validates its tax exemption status as a nonprofit organization. The executive director also ensures that their nonprofit status is verifiable and updated with the organization's home state. Due to the nature of LMN, it is important that it follow real estate associations locally, statewide, and nationally. The organization's by-laws also dictate legal, regulatory, and compliance protocols. The leadership of LMN strives to ensure it operates ethically, especially concerning any activities involving their clientele. The leadership of LMN is transparent and honest when dealing with internal and external stakeholders through verbal or written communication. During the COVID-19 pandemic, the organization followed OSHA's regulations for health and safety to ensure the protection of all stakeholders. Table 6 shows the legal, ethical, and regulatory compliance status of LMN.

Table 6

LMN's Legal, Ethical, and Regulatory Compliance Status

Processes	Measure	Frequency	Status
Federal and state labor and human resources and payroll laws	Number of violations	Annually	100% compliant
Federal and state nonprofit organization laws	Number of violations	Annually	100% compliant
Federal and state real estate and property laws	Number of violations	Annually	100% compliant
Transparent and honest behavior	Number of violations	Ongoing	100% compliant

Societal Well-Being. LMN understands the importance of societal well-being. By focusing on its internal and external stakeholders, the leaders of LMN encourage the societal well-being to create a safe relationship that seeks to diversify its reach. LMN's internal stakeholders have a safe environment to provide feedback and suggestions. There is also a sense of community among the internal stakeholders that involves aiding and supporting each other when needed. LMN's external stakeholders have respect for the organization and support its collaborative efforts. LMN's leadership team seeks to diversify their external stakeholders because they understand the importance of representation and of understanding different perspectives. LMN's pursuit of diversity among its internal and external stakeholders will help its leadership team realize its organizational values.

Community Support. LMN's leadership team provides support for its vital clientele, which includes both its existing members and potential members. LMN provides opportunities for members and potential members to achieve a better understanding of the historical aspects of their city. The leadership of LMN helps promote awareness and understanding by hosting educational programs such as events and exhibits at historical sites and buildings, giving talks about the importance of the organization's mission, vision, and values, and distributing marketing materials explaining the organization's purpose. LMN's leadership engages with community organizations and leadership by attending their events, collaborating on events, and aiding in community events whenever possible. Collaboration between internal and external stakeholders enhances the key communities and helps LMN to realize their mission, vision, and values.

Strategy

In this section, I outline the LMN's practices and procedures for the execution of its organizational strategy. The process of effectively and efficiently developing and executing an organization's strategy is important for nonprofit organizational leaders to achieve their organization's goals.

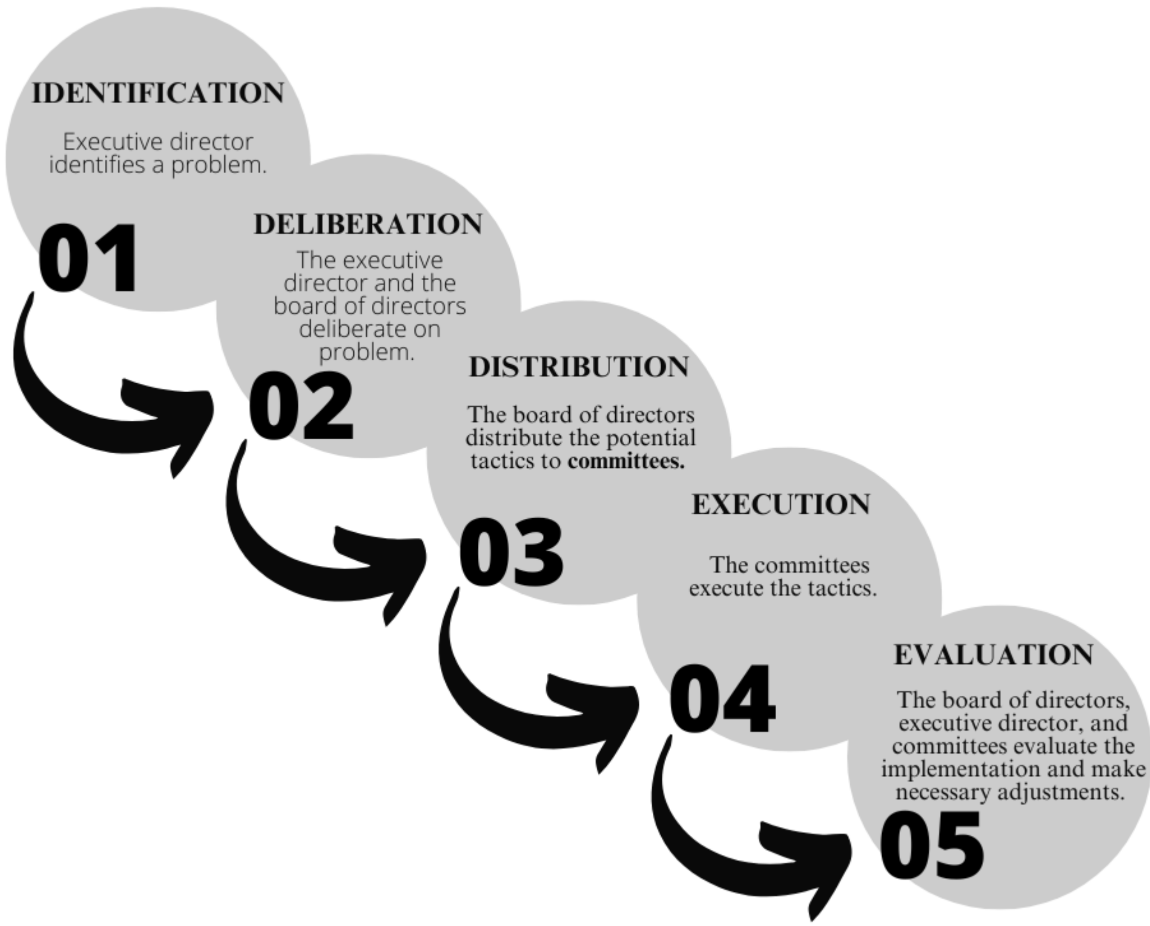
Strategy Development

LMN's organizational leadership team uses strategy development to establish short and long-term goals for the organization. The strategy development process necessitates planning, innovation, identifying realistic goals, establishing an achievable timeline, and analyzing the organization's strengths, weaknesses, opportunities, and threats. The leadership of LMN focuses on ensuring that the mission, vision, and values are central during the strategic development process.

Strategic Planning Process. LMN engages in strategic planning annually. They use two days for the leadership team, which consists of the board of directors and the executive director, to discuss and outline the annual strategic plan. Sometimes, LMN's leaders invest in an outside consultant to objectively assess their current organizational situation and make recommendations. The executive director brings a noticeable problem to the board of directors, then the board of directors discuss the problem at hand. Then, the board of directors and the executive director discuss the possible solutions. The leadership team further narrows these proposals. When the leadership team comes to a consensus about the problem and the potential solution, the leadership team distributes the potential solutions to committees to form potential strategies for implementation. The committee leaders report back to the board of directors and executive director after the implementation of the strategies, and the team discusses the results. The leadership team then adjusts where needed. Figure 8 describes the process of engaging in strategic planning for the LMN organization. The leadership team addresses the execution plan again and the committees resume the process of execution until they achieve the desired outcome. The board of directors and the executive director also decide on a timeline for achieving the desired outcome. There are also monthly check-ins during committee and board meetings to address the execution progress of the strategies.

Figure 8

LMN's Strategic Planning Process



Innovation. Generating innovative processes is usually part of LMN's strategic discussions. LMN's leadership team addresses innovation regarding the recruitment and retention of diverse members. LMN leaders understand that marketing is an important aspect of addressing the recruitment and retention of diverse members. Although the organizational leaders understand innovative marketing to strategically achieve the goal of having a more diverse membership base, LMN's leaders struggle with implementing these innovative processes. The leadership team addresses the concept of innovation during the planning process.

Work Systems and Competencies. LMN's leadership does not have enough staff to distribute strategic execution. The organizational leaders use committees, which usually consist of members of the board of directors. The executive director also aids with strategic execution. The educational and professional background of the leadership team means they are competent in executing strategy. There is a high level of participation and involvement in the organization by the board of directors. The organizational leaders help to realize the organization's mission, vision, and values by engaging in the strategic planning process.

Strategy Objectives and Considerations. The central strategic objectives of LMN are to grow membership, increase diversity, educate the community about historic preservation, fund operations, and advocate for historic preservation. The organizational leaders view the central strategic objectives as the means of highlighting the organization's strengths and opportunities to achieve organizational success. LMN depends on membership. Membership growth will increase the organization's revenue. An increase in diversity will help the organization better understand and represent the community and encourage further development of the organization's values. Membership increase would provide opportunities for increased funding, membership growth, increased diversity, allow for better educating the community about historic preservation, and increase advocacy for historic preservation. Overall, the strategic objectives align with the mission, vision, and values of LMN and contribute to the overall success of the organization.

Strategy Implementation

In this section, I outline LMN's implementation process of the strategic objectives, which includes the identification of action plans, action plan execution, resource allocation, and workforce plans. I also outline LMN's performance measures and performance projections. The work of LMN's leadership team for strategy implementation aligns the organization's mission, vision, and values.

Action Plans and Execution. LMN's leaders set strategic goals and achievements annually. The organizational leaders set the action plan and execution plan throughout the year after a collaborative effort, identified problems, and strategies to overcome the problems. The board of directors and the executive director worked together in committees to execute the action plans. The committees helped to delegate the tasks for primary objective achievement. The committees had the professional and educational experience to undertake the action plan execution effectively. Effective execution of the action plan affected the leadership's ability to realize the organization's mission, vision, and values.

Resource Allocation. LMN's leadership team was competent and executed action plans effectively. Due to the size of the organization and its capabilities, the organizational leadership team executed action plans with available resources. The leadership team executed action plans by incorporating their goals into events. For example, the leadership team of LMN hosted fundraiser events, which provided funding and served as membership drives. The different types of events offered by LMN attracted diverse potential members to the organization.

Workforce Plans. LMN's organizational leaders did not think that their minimal workforce was a disadvantage to the organization. The leadership of LMN viewed a limited workforce as a unique attribute that led to quality staff; its workforce. The people associated with the organization possessed professional and educational backgrounds that supported the work that they did, and they also had a common passion for historical preservation. Developing and executing action plans for the organization effectively depended on the volunteer board of directors, the executive director, and the delegated leadership that make up the different committees.

Performance Measures. The leadership of LMN did not retain designated metrics from their strategic plan process. That did not mean that information did not exist to make decisions. The leadership of the organization collected metrics for their daily operation, and the daily operation affected their action plan. For example, the organizational leaders kept records of the current number of members, the total funding, and outlines of upcoming events. The organizational leaders did not capture the demographics of their current members or potential members, which made it difficult to obtain data about the diversity of their members.

Performance Projections. LMN's leadership thought that more could be done to achieve key performance projections. The leadership understood its mission, vision, and values, and they also understood how these foundational elements of the organization aligned with action plans and the execution of action plans. The leadership could have done more planning and projecting the organization's purpose performance. For example, organizational leaders stressed the need for diverse members and a diverse organization, but the execution of the strategic plan did not indicate a change in membership drives that pushed for a diverse membership. Because the organizational leaders did not collect demographic data from their current and prospective members, it was difficult to predict whether the organization could drive key performance projections.

Customers

In this section, I delineate the leadership of LMN's ability to match customer expectations and enable customer engagement. The relationship between the clientele and the organization was an important component of the successful mission, vision, and values actualization for the organization.

Customer Expectations

In this section, I outline the current customers, potential customers, customer segmentation and product offerings. LMN's leaders understood the importance of the clientele to the actualization of the organization's mission, vision, and values and their role in action plan development and deployment.

Current Customers. LMN's leadership team received information from their current customers that directed their action plans. LMN's customers communicated with the organization by responding to actionable requests. For example, current and potential members communicated with the organization by responding to continuing membership invitations in the mail, shared their views at the annual meeting, had conversations with the leadership team during events, and shared their responses to posts on the organization's social media channels. Although there were different mediums for communication with customers, especially when the organizational leaders sought a response, recently appeared inconsistent. The organization used two social media platforms, and there was a drastic decline in social media posts in 2020. Table 7 shows the number of social media content posts to market to LMN's current and potential clientele. LMN's leadership wanted to reach a younger clientele and a more diverse audience, so their action plan considered their marketing and communication aspects.

Table 7

LMN's Social Media Content Posts

	Pre-COVID-19 Pandemic		COVID-19 Pandemic			
Social media channel	2018	2019	2020	2021	2022	Early 2023
Facebook	83	88	9	8	23	1
Instagram	3	5	1	6	24	2

Potential Customers. The LMN leadership obtained information from potential clients that were used in the action plan and its execution from different sources. The LMN leadership team used their fundraiser events as membership drives and utilized that period to attract new members and potential customers. Organizational leaders only collected minimal information from potential customers during membership drives. The organizational leaders also scheduled events to cater to different types of people. For example, some events targeted children, older people, and families. This was the organizational leaders' attempt to diversify.

Customer Segmentation and Product Offerings. The leadership of LMN did not use marketing research to highlight customer information about groups and market segments that would have benefited the organization. The organizational leaders did not want to put the current and potential customers into groups besides the groups of members and nonmembers. The leadership of LMN viewed customer segmentation as contrary to the notion of encouraging all people to join the organization. The leadership of the LMN organization understood that they had a unique product offering. They were open to seeking customers that were familiar with the product offering, unfamiliar with the product offering, and willing to learn about the product offering.

Customer Engagement

In this section, I examine the engagement between the LMN organizational leaders and its clientele by developing customer relationships and support and ensuring customer satisfaction and engagement.

Customer Relationship and Support. LMN's organizational leadership developed customer relationships by engaging with the customers through different mediums. Table 4 outlines the communication between the organization's leadership and its customers. The organizational leaders presented the current and new customers or members with benefits. The organizational leaders believed that the current customers would share their point of view with others, which could contribute to their membership recruitment and retention strategy. The community in the organization's city supported the organization; there was a strong positive relationship between the people of the city and the people of the organization.

Customer Satisfaction and Engagement. Customer satisfaction and engagement were also important considerations for the leaders of the organization. The organizational leaders did their best to ensure that their customers were happy with the current service. The leaders of the organization granted the paying members opportunities to make decisions about the organization by voting and by attending the annual meeting. Customers also engaged with the organizational leaders during events through social media posts and postal mail. Customer feedback was taken seriously, and the leadership discussed suggestions for improvements from customers. The LMN leadership team addressed dissatisfactions by talking with the customer about ways to improve the situation. The organizational leaders boasted of not receiving negative feedback over numerous years.

Results Triad: Workforce, Operations, and Results

The Baldridge Excellence Framework's Results Triad, which consists of workforce, operations, and results, provides a guide to explore the strengths and opportunities for the LMN organization in the following section. The subcategories involve assessing the organization's workforce, operational processes, and the results of the performance data. The relationship between the Leadership Triad and the Results Triad demonstrates the relevance of the correlation between leadership and results. The following sections and subsections analyze how the LMN organizational leaders assessed their team's capabilities and capacity, how they utilized operations for the organization's success, and how they performed measurements and analysis to achieve organizational growth.

Workforce

The LMN's leaders stressed the importance of having an effective workforce. The organizational leaders understood that supporting their workforce promoted retention and directed recruitment efforts as well. LMN's leaders had not put enough effort into developing the current workforce. The organizational leaders of LMN faced the possibility of losing their current workforce if they did not consider the need for its expansion. There was a sense of comfort between the leadership of the LMN organization and its workforce. There was an environment of respect, open communication, and understanding in the relationship between the workforce and the leadership team. The workforce relationship presented positive qualities and ensured effective and efficient mission, vision, and values achievement. Although these positive attributes of the LMN organization's workforce existed, the organizational leaders expressed concern for eventual burnout, loss, or lack of a workforce, and, eventually, the inability to achieve the organization's mission, vision, and values.

Workforce Environment

The leadership of LMN understood its obligation to ensure an effective and supportive workforce environment. In this section, I evaluated the capability and capacity, the recruitment, hiring, and onboarding process, preparation for changes to the capability and capacity, the organization and management procedures, procedures to ensure health, security, and accessibility, and how the leadership provided support to its workforce to encourage retention.

Workforce Capability and Capacity. The leadership of LMN strove to develop capability and capacity needs for its workforce, especially in the areas where there were shortfalls in the capabilities and capacity. The organization's capacity needs increased with diverse recruitment and retention. The leadership of the organization emphasized the importance of diversity in all aspects of the organization. The organizational leaders mentioned that the current composition and characteristics of their organization would hamper its sustainability. LMN's leadership attempted to recruit diverse individuals for leadership and membership and incorporated strategies to retain diverse individuals. The leadership of LMN directed organizational performance and was reactive to its clientele.

Recruitment of Workforce. Although LMN had no extensive organizational structure, its leadership sought to recruit, hire, onboard, and retain its workforce successfully. The current executive director served the organization as the only paid staff for 5 years. The executive director expressed that the organization's operations became too much to handle alone, and thus, required the addition of an unpaid staff position as the administrative assistant. The volunteer board of directors experienced recent changes as well, which included the addition of individuals that added to the organization's diversity. The executive director mentioned that the organization was seeking an intern that would learn from the current leadership and would hopefully step into the executive director role.

Preparation for Changes to Workforce Capability and Capacity. The leadership team of LMN was cognizant of potential changes to workforce capability and capacity. LMN's leadership understood that they needed to be ready for any developments, and they willingly embraced and addressed any changes to the workforce's capabilities and capacity. For example, the organization leaders realized that the organization was not a representation of the community that it served. They collectively decided to address the concept of diversity within the organization. This meant that the leadership team became proactive in their recruitment and retention efforts. The leadership team wanted to see diversity in all aspects of the organization. The organizational leaders put procedures in place and ensured that they were addressing this concern. LMN's organizational leaders understood that diversity affected changes to their capacity. During the COVID-19 pandemic, the organization's leadership team realized that decreased activities affected the financial health of the organization, and it was difficult to compensate their only paid staff person and maintain their assets. The only paid staff person, the executive director, offered to be a volunteer executive director until the organization resumed operation.

Organization and Management of Workforce. The leadership, which included the volunteer board of directors, the staff, which included the paid and unpaid staff, and the volunteers, had a very good relationship with evident communications. Communication was frequent, as needed, and transparent. The workforce expressed comfort in being able to share feedback, concerns, and suggestions with the leadership of the organization. The organization used an employee performance system to assess the work of the executive director. The workforce of the organization and its leadership were familiar with each other because of their residence in the community. This helped the leadership team to make recommendations for the workforce.

Establishment of Workforce Health, Security, and Accessibility. LMN's leadership tried to ensure workplace health, security, and accessibility. During the COVID-19 pandemic, the leadership team supported the guidelines administered by the local, state, and federal governments to ensure the safety of its workforce. Although the leadership of the LMN organization understood that operations would slow or halt in some respects, their primary focus was on the health and safety of their workforce. The nature of the work that the organization engaged in did not present many safety concerns. The board of directors, the executive director, and the volunteers collaboratively completed physical tasks to help circumvent burnout. The organizational leaders also managed internet safety and security by purchasing and installing safety software. Even though the organization was not as active on the internet, there was still potential for fraudulent activity to occur. The organizational leaders ensured that their workforce could access the sites and designated office space without problems. The organizational leaders also boasted of the positive reputation of the organization within the community and indicated that there had not been a need for the incorporation of public relations strategies.

Retention of Workforce. The leadership of LMN attempted to provide the right services, benefits, and policies to its workforce, which helped to support its workforce and eventually retain them. LMN's leadership did not have any outlined policies for paid time off, holiday pay, vacation time, or retirement. The relationship between the board of directors, the executive director, and the administrative assistant ensured the provision of informal benefits such as time off. For example, the executive director had to take time off for personal issues and the board of directors worked together to ensure the organization's continued seamless operation. The executive director also worked part-time, Tuesdays to Thursdays, for at least 25 hours a week. The executive director mentioned that the passion involved was a benefit of working with the organization. The leadership team also noted that if the organization engaged in a hiring process that resulted in multiple paid employees, they would ensure that policies, procedures, and provisions were in place to provide benefits.

Workforce Engagement

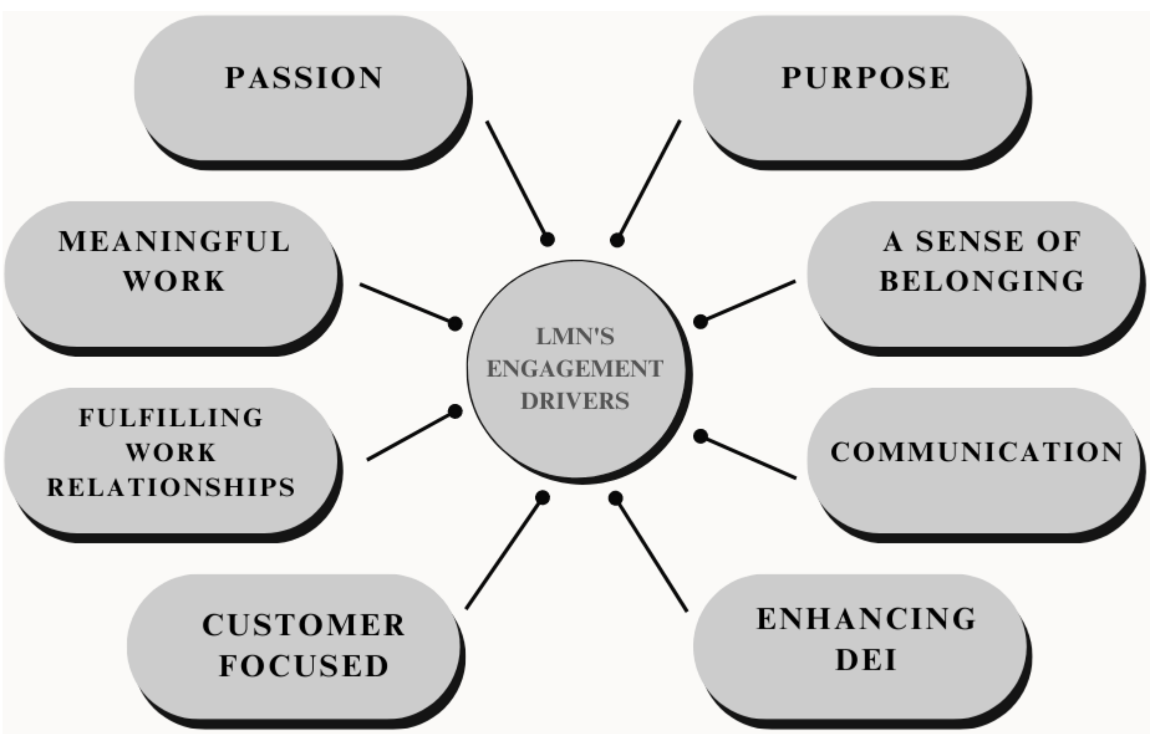
The leadership of LMN engaged its workforce, which impacted retention and performance outcomes. In this section, I evaluated the leading factors of workforce engagement, such as the drivers and the assessment. I also addressed the organizational culture, performance management and development, learning and development systems, and career development of the LMN organization. The leaders of LMN understood how these aspects of workforce engagement affected recruitment and retention and overall organizational performance.

Engagement Drivers. The leadership of LMN had a keen understanding of the key engagement drivers that affected their workforce. The main engagement drivers of the organization included (a) purpose; (b) passion; (c) meaningful work; (d) a sense of belonging; (e) fulfilling work relationships; (f) communication; (g) customer focus; and

(h) enhancing diversity, equity, and inclusion. LMN's workforce sought intangible benefits. They became a part of the organization because they wanted to be part of realizing the organization's mission, vision, and values. Figure 9 shows the engagement drivers for the LMN organization. For example, the executive director continued to operate the organization as best as possible when there was no form of monetary compensation. The board of directors, the executive director, the administrative assistant, and the volunteers had a strong relationship that encouraged open and honest communication. The workforce and the leadership engaged with the organization's mission, vision, and values because they had a purpose and passion for the organization's role in the community and a duty to its clientele.

Figure 9

LMN's Key Workforce Engagement Drivers



Engagement Assessment. LMN's leaders understood the need for engagement assessments. LMN had no formal method or policy for assessing workforce engagement. There was a very good relationship between the workforce and the leadership team, which encouraged transparency in communication. With such a small organizational structure, the organizational leadership effectively evaluated personal and professional workforce engagement strategies and openly deliberated on the feedback, made suggestions, and asked questions.

Organizational Culture. The relationship between the leadership of LMN and its workforce encouraged a culture of transparency and open communication, high performance, and engagement. The leadership team of the organization built a relationship between the leadership and its workforce. The main success factors of the relationship between the leadership team and its workforce included transparency and open communication. The workforce was comfortable communicating with the leadership team and vice versa. Because of the strong, communicative relationship, the leadership and the workforce collaborated and engaged in high performance and organizational activity. The leadership and the workforce had common goals and values, and they shared in the effective execution of the organization's mission. The leadership and the workforce had a passion for engaging with both the internal team and the external team. The workforce engagement drivers were important in ensuring the efficiency of the mission, vision, and values execution.

Performance Management. The board of directors engaged in an annual performance review of the executive director. The executive director did not evaluate the administrative assistant or the volunteers. It was possible to consider the annual election of members of the board of directors as a performance management method. Workforce engagement drivers were the rewards of engaging with the organization's mission, vision, and values. The organizational leaders had monthly committee and board meetings to assess the organization's progress in achieving its goals. The organizational leaders and the workforce had a transparent and open communicative relationship so that if there were any concerns, suggestions, or feedback, the leaders created the time and space to listen.

Performance Development. The leadership of LMN hosted an annual meeting to encourage discussions surrounding the organization's growth. The leadership team used this time to assess the organization's strengths, weaknesses, threats, and opportunities for improvement. Based on this data, the organizational leaders discussed potential methods to realize the organization's mission, vision, and values. After the discussion, the goals were delegated to the committees for execution.

Learning and Development System. LMN did not have options for educational or professional development. The leadership team was composed of retirees and individuals with professional backgrounds. The organizational leaders emphasized the main engagement drivers. They did not evaluate their workforce based on the requirements associated with their organizational roles. The individuals engaged in achieving the organization's mission, vision, and values joined the organization because of their connection to the key engagement drivers.

Career Development. LMN lacked formal workforce career development policies and procedures. Except for the volunteers, all the leadership team and staff had at least an undergraduate degree. Some individuals within the leadership team had professional degrees. The majority of the leadership team were retirees. The leadership did not see a need for career development but was open to offering career development opportunities if there was an increase in the workforce size.

Operations

In this section, I evaluate how LMN's leadership designs, manages, and improves aspects of the main products and processes to ensure effective and efficient management of the overall organization's operations. The leadership of LMN engaged fully in its operations.

Work Processes

In this section, I provide an overview of how the LMN's leadership team selects, creates, directs, and enhances the organization's key products and work processes. The work processes were a component of the organization's operations. The leadership team ensured the efficiency of key products and work processes.

Key Products and Work Processes. The leadership of LMN defined its main products and work processes. Because the organization had existed for over 50 years, the leadership inherited some products and work processes from previous leadership. The leadership of the organization adjusted the products and work processes left by previous leadership. The organization’s leadership understood the importance of keeping some of the original features of the key products and work processes but also understood that the adjustments aligned with changes to the organization. For example, the executive director pointed out that the organization adjusted the key products to include a focus on diversity, equity, and inclusion. The leadership of LMN deliberated on key products and work processes. They determined that these adjustments also aligned with their focus on clientele. The organization’s leadership, which included the board of directors and the executive director, discussed innovative products and work processes before implementing them. Ideas for innovative products and work processes originated from internal and external stakeholders. Table 8 outlines the products and processes, requirements, and measures of the LMN organization.

Table 8

Strategic Conditions for LMN's Focus Areas

Product and processes	Requirements	Measures (over time)
Historical sites and building exhibits	Positive sales	Number of sales
	Friendly staff	Positive and negative feedback
	Membership recruitment	Number of interests or sign-ups
	Membership retention	Number of renewals
Preservationist memberships	Positive sales	Number of sales
	Friendly staff	Positive and negative feedback
	Membership recruitment	Number of interests or sign-ups
	Membership retention	Number of renewals
Educational informative sessions	Friendly staff	Positive and negative feedback
	Membership recruitment	Number of interests or sign-ups
	Membership retention	Number of renewals
	Popular subjects	Number of attendees
Fundraiser events	Positive sales	Number of sales
	Friendly staff	Positive and negative feedback
	Membership recruitment	Number of interests or sign-ups
	Membership retention	Number of renewals
	Financial donations	Amount of monetary donation
	In-kind donations	Amount of in-kind donation
	Donor recruitment	Number of new or potential donors
	Donor retention	Number of continuous donors
Historical site or building preservation	Friendly staff	Positive and negative feedback
	Quality work	Positive and negative feedback
	Efficient work	Number of activities for restoration
	Safe work	Number of reported accidents

Process Management and Improvement. The leadership of LMN recognized the need to enhance and assist with the organization's work processes, which impacted process performance. Although LMN did not have a system in place to obtain relevant information about work quality, which helped to enhance products and services, the leadership team found an informal method of obtaining the information. The leadership team captured feedback from their clientele on the organization's social media accounts.

The organization's social media accounts allowed customers to interact with the organization through comments, likes, and shares. Another informal process that LMN's leaders used to capture feedback was in-person events where they communicated with the attendees and observed the environment. The organization's leadership team used the feedback to improve and develop new products and processes.

Supply Network Management. The leadership of LMN managed its supply network because it placed importance on having historical sites and buildings available. The organization leaders depended on community members to access their historical sites or buildings, the community partners provided the tools used for historical preservation, and the technology supplier ensured that the equipment for daily marketing and advertising operations was functional. The leadership of LMN depended on the community to supply the pieces that ensured that the organization could effectively and efficiently execute its mission, vision, and values. The organization also received monetary and in-kind donations from community members and partners which assisted in accomplishing the organization's goals.

Innovation Management. The COVID-19 pandemic prompted LMN's leadership team to think about innovative ways to operate effectively. The leadership team, which included the board of directors and the executive director, discussed the potential innovative processes. The decision to implement innovative processes depended on the leadership team. Innovation management discussions usually occurred at the monthly board meetings. The organizational leadership incorporated innovative processes into their fundraiser events and membership drives. The leadership team discussed and agreed to incorporate card reader options at their fundraiser events. The leadership team also discussed and agreed to create the potential for new and existing members to join or renew their membership on the organization's website. Incorporating these innovative practices helped the LMN organization with growth positioning.

Operational Effectiveness

In this section, I explore LMN's methods for ensuring effective operations management. I evaluated the organization's processes for managing the cost, efficiency, and effectiveness of its operations. I examined their methods for verifying data security and securing information and key assets. I address how they managed a safe operating environment and their management processes for ensuring organizational preparedness for disasters and emergencies.

Managing Cost, Efficiency, and Effectiveness of Operations. LMN's organizational leaders were responsible for managing the cost, efficiency, and effectiveness of the organization's operations. The leaders of LMN utilized less than the organization's incoming revenue and were very conscious about their method of managing costs. The leaders of the organization understood that the organization was a nonprofit, and thus managing cost effectively and efficiently was essential for sustaining the organization. The organizational leaders provided a budget to determine their regular expenditures and costs. The organizational leaders decided the pricing for events and services, membership prices, and the executive director's salary. The organization depended on contributions, grants, investments, and events. From their revenue, the organizational leaders developed a budget for regular expenses and functional expenses.

Business expenses were associated with operating the organization and included utilities, insurance, office supplies, postage, mailings, and the internet. The salary of the executive director was also an expense. The organization leaders added marketing and advertisement to their list of expenses. The executive director and the administrative assistant ensured the day-to-day operations of the organization during their allocated 25 hours, Tuesdays to Thursdays. If assistance was needed at the designated office space, the executive director or the administrative assistant reached out to the board of directors. For example, if the designated office space required minor repairs, a board member would make the repairs. If the repairs required a professional, the executive director communicated with the board president, and a decision was made to hire an expert.

Verifying Data Security, Information, and Key Assets. LMN’s organizational leaders knew how critical it was to secure data and information and protect key assets. The organizational leaders, especially the executive director, had access to personal information and sensitive data because of the customer engagement involved with their mission. The organization had physical assets that would be costly to replace if unexpected damage occurred. The organizational leaders engaged in data and information security and ensured the use of passwords for all digitally accessible information. Also, sometimes the executive director received checks as a form of payment and locked the checks in a safety deposit box. The organizational leaders also monitored the historical sites and buildings and locked the doors and windows for safety. The organization’s leaders put effort into protecting the organization’s sensitive information and key assets.

Supplying a Safe Operating Environment. LMN's leaders encouraged a safe operating environment. The leaders of the organization had a good relationship with their workforce and encouraged them to be careful and mindful of any unsafe environment. Usually, if there is a potential threat, the executive director communicated the situation to the board president. During the COVID-19 pandemic, the leadership team acted quickly by moving to virtual contact, requiring masks when it was necessary to meet in person, and avoiding in-person events. The organization's leadership had an older age range of individuals, so ensuring that their health was protected was a priority. The leadership of LMN previously discussed the possibility of security camera installation, but decided to decline to install security cameras as it would affect the preservation of historical buildings. The organization leaders also paid attention to the location of the sites and buildings to ensure that the executive director was never left alone, which encouraged protecting the executive director's safety and well-being.

Safety and Emergency Preparedness. The organization leaders did not explicitly state any required actions regarding safety and emergency preparedness. The organization, like other organizations, considered the COVID-19 pandemic an emergency. The organization leaders understood that the lack of safety and emergency protocols affected the organization's efficiency. The leadership of LMN did not highlight any emergencies or natural disasters that affected the organization's operation. The open communication and relationship that the organization's leaders encouraged with the workforce made sudden implementation of safety and emergency preparedness protocols less difficult.

Measurement, Analysis, and Knowledge Management

I use this section to analyze the leaders of LMN's measurement, analysis, and knowledge management. These categories were significant in assessing the organization's overall performance. With the Baldrige Excellence Framework as my guide, I addressed the organizational information for the leadership team and the organization's leaders' ability to manage performance and make necessary improvements. The appropriate measurement, analysis, and knowledge contributed to LMN leaders' ability to support its Leadership and Results Triads effectively.

Measurement, Analysis, and Improvement of Organizational Performance

LMN's leaders evaluated and analyzed crucial data regarding the organization's functionality and finances to enhance its performance. The leadership team set times on the agenda of the board of directors' monthly meetings to discuss the operational and financial data. The organization leaders of LMN recognized the importance of analyzing the functional and financial aspects of the organization because of their impact on the organization's overall performance. The leadership team reviewed the number of current members, the number of members in each membership category, fundraiser events, and the current financial health of the organization during the monthly board of directors meeting. The three main items on the board of directors meeting agenda were (a) financials, (b) memberships, and (c) events. The leadership team discusses the information during the monthly board of directors' meeting and decides the next steps based on that discussion. The organization's leadership team reviewed data from the operational aspect of the organization, such as the number of new members, the number of past members, the number of members in each membership category, membership recruitment and retention strategies, diversity status of current membership, marketing and awareness strategies, upcoming events, past events, and the status of historical sites and buildings. The leadership team only recorded numerical information, such as the number of current members and the number of members in each category. The leadership team discussed other aspects of the organization's operation to make decisions. Also, the leadership team reviewed data from the financial side of the organization, such as the current revenue balance, current expenses total, total revenue from membership, total revenue from events, the total amount of expenditures, total revenue from grants or other contributions, and the current endowment balance, during each monthly board of directors meeting. Table 9 outlines LMN's main operational and financial performance measures.

Table 9

LMN's Key Operational and Financial Performance Measures

Measures	Frequency
Operational	
Number of new members	Monthly
Number of past members	Monthly
Number of members in each category	Monthly
Goal number for new members	Annually
Membership recruitment and retention strategies	Monthly
Diversity status of current membership	Monthly
Marketing and awareness strategies	Monthly
Upcoming events	Monthly
Past events	Monthly
Status of historical sites and buildings	Monthly
Financial	
Current revenue balance	Monthly
Current expenses total	Monthly
Total revenue from membership	Monthly
Total revenue from events	Monthly
Total amount of expenditures	Monthly
Total revenue from grants and contributions	Monthly
Current endowment balance	Monthly
Salary recommendations	Annually

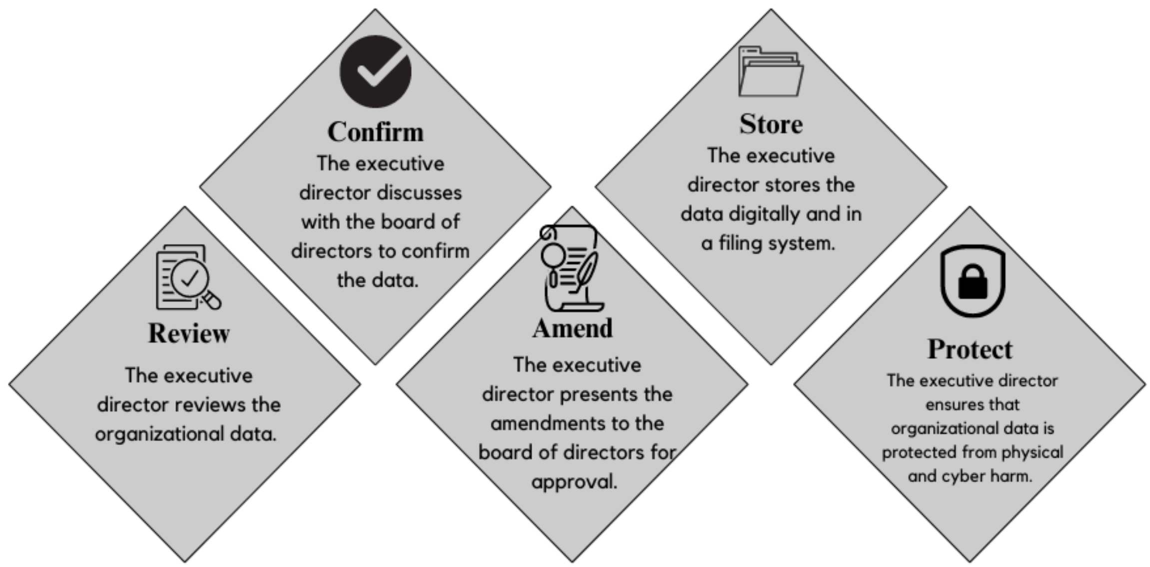
The leaders of LMN viewed data analysis at the monthly board meetings as an efficient way to check the progress of the organizational performance. The method used by the organization provided opportunities for the organization to make improvements when they were identified as necessary. Participant 1 mentioned that the leadership team observed the actions of other organizations in proximity but did not collect data to use for comparison. Instead, the organization's leaders sought collaborative relationships with other organizations when they identified the other organizations' strengths as their organization's weaknesses.

Information and Knowledge Management

The leadership of LMN respected their responsibility to obtain and manage valid information and knowledge. The organization leaders boasted of their effective methods to manage the information and organizational knowledge because of practices pre-dating the current leadership team. The organization preserved historical sites and buildings. Information and knowledge management were no different for the organization. The organization's leaders kept physical pieces of information and organizational knowledge that go back about 50 years. The current leadership continued to practice the methods the previous leadership team had implemented and adopted several new methods to supplement existing methods. The executive director noted that handwritten information was still preferred when doing business. The leadership team also recorded information carefully. During the board of directors and committee meetings, the executive director used a recording device to record the proceedings. This ensured that the leadership team could verify the information. With established information and organizational knowledge, the executive director reviewed the information and confirmed the information by discussing the information with the board of directors. The discussion often resulted in amendments to the information, so the executive director brought the amendments to the board of directors for a vote of acceptance. The executive director then stored the data, employing the digitalization process to convert paper copies to digital ones and kept all physical copies. Then, the executive director ensured the protection of digital and physical information and knowledge. The executive director used a password-protected system for digital information and a locked filing cabinet system and a locked building for physical information and knowledge. Figure 10 describes the process used by LMN for information and knowledge management.

Figure 10

LMN's Information and Knowledge Management Process



LMN's leaders are literally sources of organizational information and knowledge because of their age, background, residence, and number of years with the organization. The leadership team can discuss and dive into the topics related to the organization, such as the organization's history, its presence in the city, and its historical processes and procedures. The leadership and workforce have an extensive amount of information and knowledge about the organization. Thus, when leadership reviews recruitment and retention, they look for individuals with a common passion and information and knowledge about the organization, its purpose, and the city. Managing the leaders and the workforce of LMN is also managing the organization's flow of information and knowledge.

Collection, Analysis, and Preparation of Results

Thematic Findings

The purpose of this qualitative single case study was to explore the strategies that nonprofit organization leaders use to recruit and retain a diverse membership. The research question of this qualitative single case study inquired about the strategies that nonprofit organization leaders use to recruit and retain a diversified membership. I analyzed the organization's data, such as financials, by-laws, board and committee minutes, websites, and social media accounts. I identified the key themes and developed a thematic analysis based on three participants' interviews and the obtained data. I found two major themes that provided justification for the LMN leadership team's capability to recruit and retain diverse members. The two themes employed by the leadership of LMN were (a) recognition and understanding and (b) marketing strategies to diversify membership. The conceptual framework: CMMT corroborated the themes.

Thematic Finding 1: Recognition and Understanding

Nonprofit organization leaders can diversify their organizational membership to achieve competitive advantage and organizational growth by recognizing and understanding (a) the organization, (b) the community, and (c) the various people within the community. I used this theme based on the data analysis of my semistructured interviews with the three participants, and data from various sources. I worked with the leadership of LMN to retrieve the necessary documentation and identify the themes. The organization was supportive and helpful in providing the necessary information to complete the analysis.

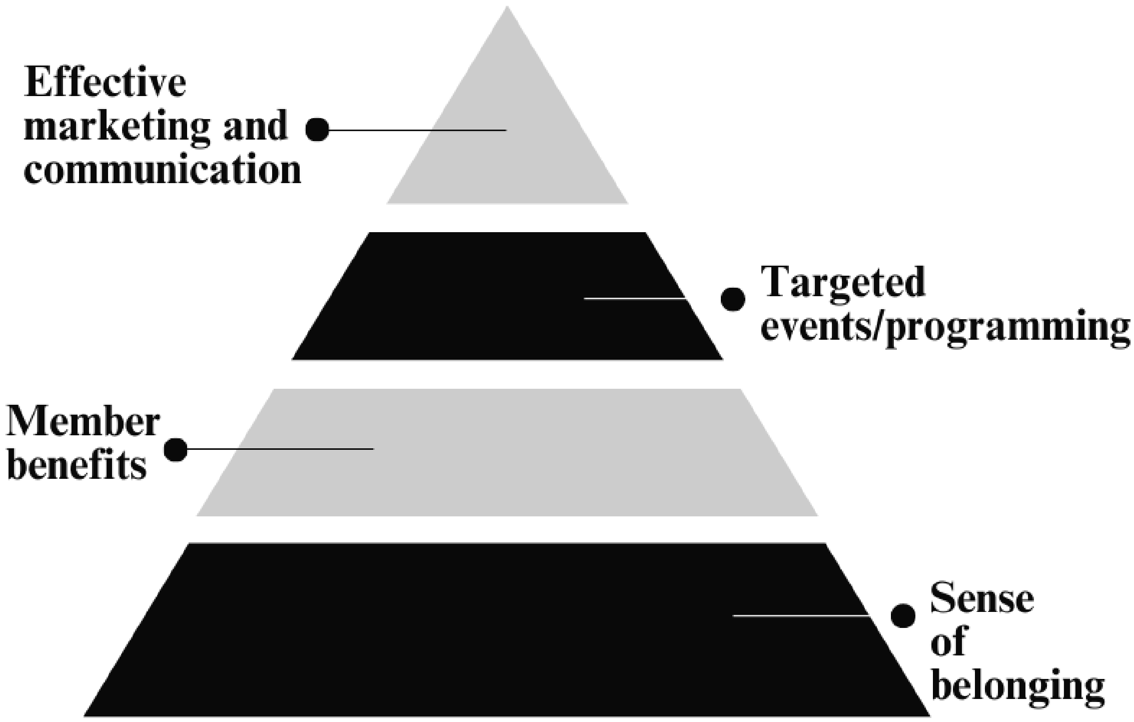
The first recurrent theme, recognition and understanding, revealed that all participants understood that the organization was not representing the community that they serve, and they wanted to accomplish more in the community that aligned with their mission, vision, and values. All participants expressed a deep understanding that there was a need to recognize and understand the people that make up the community that they served. All three participants in the semistructured interviews confirmed that their organization lacked diversity, and they were willing to address the need for diversity in their organization. All three participants agreed that they attempted strategies to recruit and retain diverse members into the organization. Participant 1 mentioned that the organizational leaders reduced the cost of attend events to attract a more diverse group. Participant 1 and Participant 2 disagreed on the idea of working with other organizations with similar goals as a strategy of obtaining pertinent information about the community that they serve. All participants agreed and accepted the idea that diversity would benefit the organization’s recruitment and retention strategies by creating a welcoming environment for the community.

The organization’s by-laws pointed out that the organization welcomed people of distinctive characteristics and backgrounds. Although the organizational leaders did not compare data with other organizations, the participants expressed that they recognized and understood the organization’s deficiencies through normal observations. One participant mentioned, during the semistructured interview, that they wanted to overturn the idea that the organization encouraged elitism. LMN’s leaders recognized that there was an issue, and they understood the importance of solving the issue. The organizational leaders attempted to solve the issue by prioritizing diversity in every aspect of their organization. Mullin et al. (2021) advocated for a leadership team like LMN’s because they engaged in open and respectful discussion about the issue, accepted it, and worked together as a team to tackle it. The organizational leaders saw a particular need for younger members in their organization. Sahagun (2019) agreed that, with the constant change in the composition of the population of the United States, having a younger audience can improve organizational strategy. The conceptual framework confirmed the idea that the best way to approach reaching diverse groups is to recognize and understand diverse groups by investigating the different groups under different standards (Burton, 2002). Burton (2002) further explained the need to recognize and understand the subgroups; therefore, addressing stereotypes of all groups. Also, it is important for organizational leaders to recognize and understand their own individual and organizational biases (Rosenkranz et al., 2021). The recognition of such biases can allow organizational leaders to better serve their communities.

The leadership team recognized and understood their purpose in the community as clearly stated in their organization’s mission, vision, and values. The organizational leaders also recognized and understood the importance of members and membership to the organization. The organizational leaders listed their members as a value and an asset to the organization. Membership sustained LMN, so the leaders of the organization put effort into membership recruitment and retention. The leaders of LMN recognized and understood that potential members had reasons for joining organizations, and it was the duty of the organizational leaders to demonstrate their support for those reasons (Ganesh et al., 2022). The organizational leaders of LMN found that some engagement drivers applied to members in a similar way to the workforce. The leaders of LMN understood that they were addressing a variation of their community members. The conceptual framework also outlines that groups and subgroups have aspects of their culture that are pertinent in the creation of their identities, which affects the way they receive and perceive messages (Burton, 2002). The leaders of the organization were ready to recognize and understand the differences. Oursler (2020) emphasized the need to gain an understanding of individual and cultural variations in groups when attempting to reach diverse audiences. Figure 11 shows the main engagement drivers involved in recruiting and retaining new members and their level of importance.

Figure 11

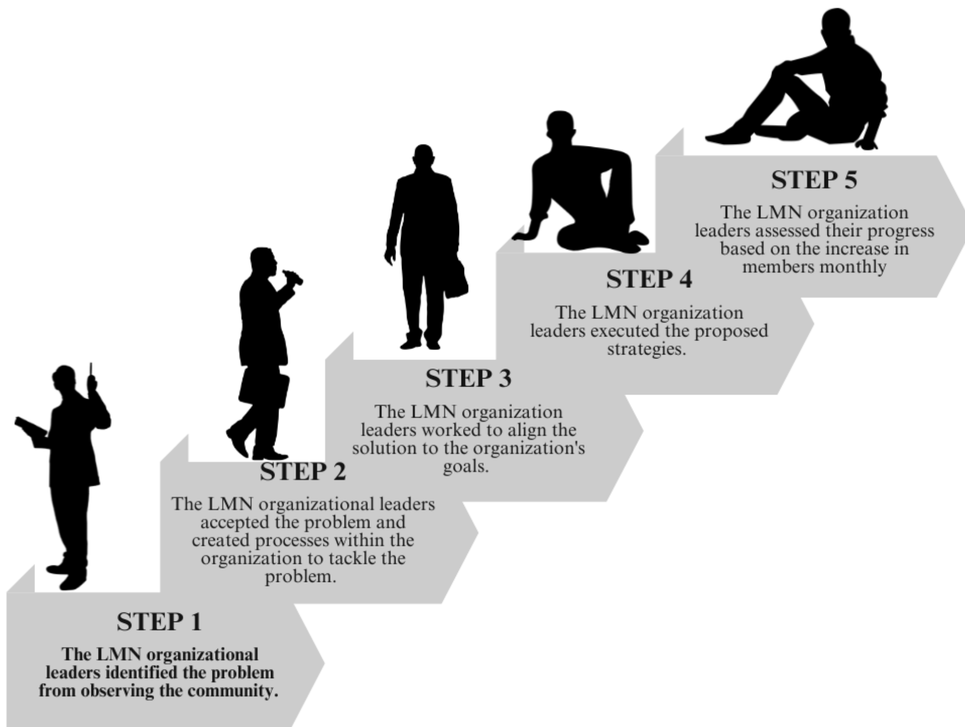
LMN's Key Membership Recruitment and Retention Engagement Drivers



The organizational leaders of LMN had an interest in building strong relationships with their current members, their community, and their potential members. They recognized and understood that building bonds and relationships boosted their credibility regarding recruitment. Andrasik and Mead (2019) advised relationship building for trust building, which was a component of tackling recruitment and retention. The leader of LMN followed five steps when attempting to recognize and understand the issue. Figure 12 outlines the steps that the leaders of LMN took to recognize and understand their community and their community members.

Figure 12

LMN's Steps to Recognition and Understanding



In summary of my findings, peer-reviewed literature in the discipline and new peer-reviewed literature confirm that nonprofit organization leaders incorporate strategies to diversify their organizational memberships by recognizing and understanding the organization, the community, and the people within the community. This theme was prominent during my data analysis of semistructured interviews, web-based platforms, and organizational documents. The leadership of LMN successfully executed this strategy of recognizing and understanding the organization, community, and community members as the first step to address diverse recruitment and retention. I corroborated this theme with my scholarly research by using peer-reviewed literature pre and post proposal stages.

Thematic Finding 2: Marketing Strategies to Diversify Membership

Nonprofit organization leaders can diversify their organizational members by incorporating strategies that affect the way they market to diverse groups within their community. I concluded that marketing strategies for diversifying membership were the second prominent theme from the data analysis, semistructured interviews, social media, and organizational documents. After LMN's leaders recognized and understood their role in tackling the issue of diversity in their organization, they created messages that conveyed that they welcomed all people. LMN's leaders also recognized and understood the connection between marketing, recruitment, and retention. Figure 13 shows the relationship between recruitment and retention, and an organization's marketing strategy.

Figure 13

Connection Between Marketing, Recruitment, and Retention

Alashmawy and Yazdanifard (2019) specified that using skills and strategies, especially in a competitive environment, was considered recruitment marketing. The organizational leaders wanted to share their mission, vision, and values with their community, so they attempted different strategies. During the semistructured interview, one participant mentioned that the organizational leaders incorporated the heavy use of social media. Social media can be effectively used as a marketing strategy to communicate with the target audience (Campbell & Lambright, 2019). Campbell and Lambright (2019) further confirmed that the use of the internet was an effective strategy for marketing, recruitment, and retention. The participants in the interview also confirmed that they incorporated their website to be more interactive, they created events that targeted different groups of people, they alternated the events, and they used their brand to highlight the organization's purpose. LMN's website and social media accounts highlighted upcoming events, and the marketing posts included the low cost of attendance. The organization leaders created committees to delegate tasks, and thus, they created the development committee to tackle memberships and marketing. The organization leaders created dedicated outreach teams as a strategic approach. Woo and Myers (2020) believed an effective method to achieve marketing goals was to have a dedicated outreach team.

One participant during the semistructured interview mentioned that the organization's brand is recognizable and reputable. The organization's brand is unique, and the organizational leaders used the brand as a strategy for marketing the organization's mission, vision, and values. Organizational branding also connotes ideas of reputation and engagement strategies (Kele & Cassell, 2022). The leadership of LMN used its unique brand digitally, through traditional print mediums, to share organizational information. The messages shared by the organization's leadership targeted community members. The organization leaders did not use discriminating language or stereotypical language in their marketing messages. The organizational leaders connected the messages to the culture of the intended audience, which promoted effective marketing (Song et al., 2018). The organization leaders of LMN also demonstrated that they were willing to adjust their medium of communication so that they could reach a diverse audience. Burton (2002) stresses the importance of tailoring marketing methods to meet the needs of the different diverse groups with attention to avoiding stereotypical language. Table 10 shows how the organization marketed to its audience.

Table 10

LMN's Methods for Marketing to Targeted Audiences

Method of marketing	Frequency	Type
Facebook	Regular	Digital
Instagram	Rarely	Digital
Organizational website	Rarely	Digital
Organizational pamphlets	Often	Print
Organizational stationery	Often	Digital/print

Foy (2021) emphasized the need for organization leaders to put effort into retaining diverse members by encouraging a sense of belonging. LMN leaders encouraged incorporating diverse members into their leadership team, which encouraged a sense of belonging and created an environment to learn from diverse people. The conceptual framework used in this study coincided with the thematic analysis by highlighting the fact that variations in multiculturalism contributed to effective marketing strategy and discouraged the use of stereotypical language when marketing to a diverse audience.

In summary of my findings, peer-reviewed literature in the discipline and new peer-reviewed literature confirmed that nonprofit organization leaders incorporate strategies to diversify their organizational membership. This theme was prominent during my data analysis from semistructured interviews, web-based platforms, and organization documents. The leadership of the LMN successfully executed this strategy by creating various marketing strategies to attempt to diversify its membership. I corroborated this theme with my scholarly research using peer-reviewed literature pre and post proposal stages, and the conceptual framework: critical multicultural marketing theory.

Product and Process Results

In this section, I outline the product and process results for LMN's leaders. I focus on product performance and process effectiveness results, product and customer service process results, product and process effectiveness and efficiency results, safety and emergency preparedness results, and supply network management results for the leadership of the organization.

Product Performance and Process Effectiveness Results

The outlined mission, vision, and values of LMN concisely described the organization leaders' view on product performance and process effectiveness. The organization leaders believed that their products and services enhanced the city, provided opportunities for the community to appreciate its rich history, and touched all different types of people. LMN's leadership viewed its product as a means of finding commonality among all people within the city. The organizational leaders created opportunities for all people to attend their events, offered low-cost events, and varied their events. LMN's leaders expressed happiness knowing that they can capture, recreate, preserve, and share a unique history with the community. The leaders of LMN believed that the product performance and process effectiveness aligned with its mission, vision, and values, which enhanced its stakeholders and the community. The product performance and process effectiveness also aligned with Burton's (2002) CMMT, which addresses aligning messages to target specific groups.

Product and Customer Service Process Results

The leadership of LMN strove for product and customer service process results that supported its internal and external stakeholders and encouraged their appreciation of the organization's purpose and its role in the community. The leaders of the organization ensured that both internal and external stakeholders had favorable experiences when they engaged with the organization in any capacity. LMN's leaders also firmly believed that their products and services served all people of the city, regardless of race, gender, or age. The leadership team created an environment that was welcoming, promoted a sense of belonging, and provided equitable access to the products and services offered. Thus, the leadership of LMN understood the importance of effective and efficient results from its product and customer services functioned as a benefit to all people in the community.

Product and Process Effectiveness and Efficiency Results

The leadership of LMN assessed its product and process effectiveness and efficiency and observed and addressed both positive and negative outcomes. The organization leaders viewed positive outcomes as those that promoted satisfied internal and external stakeholders. Positive outcomes were achieved with effective and efficient product and service delivery. When the internal and external stakeholders were unsatisfied, it produced negative outcomes, which indicated ineffectiveness and inefficiencies and would requires remediation. LMN's leaders enhanced its product and process effectiveness and efficiency results after considering positive and negative outcomes.

Safety and Emergency Preparedness Results

The leadership of LMN realized that its safety and emergency preparedness results were positive because the only emergency that the organization encountered was the COVID-19 pandemic. Like other organizations, LMN effectively followed the local, state, and federal guidelines during the height of the COVID-19 pandemic and ensured the safety of its internal and external stakeholders. Besides the COVID-19 pandemic, the organization leaders had not encountered any serious threats. The leaders of LMN encouraged enhanced safety and emergency preparedness and ensured that they could tackle potential emergencies.

Supply Network Management Results

The leadership of LMN had positive results concerning its supply network management. LMN's leaders mentioned the available community support as a strong indicator of having achieved supply network management results. The organization leaders received monetary and in-kind donations from community partners and members. One feature of the organization was the exhibition of historical homes occupied by community members. The community members and partners collaborated with the leadership team of LMN and realized the organization's mission, vision, and values. The organization leaders obtained all the supplies necessary for the organization's operation locally. Everything needed for the organizational leaders to accomplish organizational goals was procured from community members and partners. This highlighted the positive results achieved by LMN's management of the organization's supply network.

Customer Results

In this section, I highlight LMN leaders' customer results by addressing customer satisfaction and dissatisfaction results and customer engagement results.

Customer Satisfaction and Dissatisfaction Results

LMN's leadership team received considerably more positive feedback from customers than negative feedback. The leaders of LMN assessed customer satisfaction by reviewing feedback from different platforms, including social media, phone interactions, face-to-face interactions, repeat attendance to events, membership renewals, membership referrals, and opportunities with new community partners. LMN's leaders assessed customer dissatisfaction by reviewing negative feedback from clientele, complaints on social media, face-to-face complaints, loss of membership renewals, lack of membership referrals, loss of continued event attendance, and decreased community support. The leadership team used positive feedback to gauge customer satisfaction and negative feedback to gauge customer dissatisfaction. The organization leaders did not obtain quantifiable data to assess customer satisfaction and dissatisfaction, but their assessment measures produced actionable results. Table 11 shows how the leaders of the LMN organization measured customer satisfaction and dissatisfaction.

Table 11

LMN's Customer Satisfaction and Dissatisfaction Measures

Measures	Satisfaction	Dissatisfaction
Feedback from social media platforms	*	*
Feedback from face-to-face interactions	*	*
Continued attendance at events	*	
Discontinuation of attendance at events		*
Membership renewals	*	
Membership referrals	*	
No membership renewals		*
No membership referrals		*
Community partner support	*	
Lack of community partner support		*

Customer Engagement Results

The leadership of LMN used positive and negative results to measure customer engagement. The organization leaders attributed positive customer engagement to having clientele speak highly of the organization, its leaders, the processes, and the benefits of participating in it from different communicative platforms. Positive customer engagement also entailed new and renewed memberships, membership referrals, new and renewed community partnerships, and increased event attendance. The leadership of the organization attributed customer disengagement to receiving critical comments about the organization, its leadership, its processes, and its benefits from different communicative platforms. Also, the organization leaders viewed the loss of members, lack of membership renewals, lack or no membership referrals, lack or loss of community partnerships, and no or minimal event attendance. The leadership of LMN did not quantify its customer engagement. Instead, the leadership of the organization used a qualitative approach to assess feedback and made informed decisions, which produced actionable results. Table 12 describes the measures used by the leaders of the LMN organization to assess customer engagement and disengagement.

Table 12

LMN's Customer Engagement and Disengagement Measures

Measures	Engagement	Disengagement
Feedback from different platforms	*	*
Continued attendance at events	*	
Discontinuation of attendance at events		*
Membership renewals	*	
Membership referrals	*	
No membership renewals		*
No membership referrals		*
Community partner support	*	
Lack of community partner support		*

Workforce Results

In this section, I assess LMN's leadership workforce results by outlining LMN's workforce capability and capacity results, workforce climate and engagement results, and workforce and leader development results.

Workforce Capability and Capacity Results

The leadership of LMN assessed its workforce capability and capacity results by reviewing the requirements for the execution of the organization's purpose. The leadership reviewed the organization's morale, abilities, and instruments associated with the execution of organizational purpose. The board of directors, executive director, administrative assistant, and volunteers collaboratively carried out the organization's processes and procedures, which ensured that the organization's leaders were effectively executing the organization's mission. The relationship between the leadership and the workforce exhibited trust and open communication. The organization's leaders did not quantifiably monitor workforce capability and capacity results. Instead, the organization's leaders encouraged feedback from the workforce and made informed decisions that ultimately affected the clientele.

Workforce Climate and Engagement Results

The leadership of LMN did not quantify its workforce climate and engagement results. Rather, it assessed the satisfaction and morale of both volunteer and paid workers. The organization's leaders benefited from a qualitative approach to assessing the workforce climate and engagement results because they could continuously identify and rectify dissatisfaction. The positive workforce climate and engagement results outlined the satisfaction of the volunteer and paid workers. Satisfaction meant that the workforce engaged with the leadership effectively through open communication and carried out the mission, vision, and values. Negative workforce climate and engagement results outlined the dissatisfaction of the volunteer and paid workers. Dissatisfaction meant that the workforce did not engage with the leadership effectively through open communication and carried out the mission, vision, and values poorly. Table 13 outlines the measurements used in LMN's workforce climate and engagement results.

Table 13

LMN's Workforce Climate and Engagement Results

Measures	Positive	Negative
Workforce open communication	Satisfied	Dissatisfied
Workforce output	Engaging, accurate	Frustrating, inaccurate
Workforce morale	Passionate, willing	Fed up, unwilling
Workforce relationship with leaders	Open, trusting	Reserved, untrustworthy

Workforce and Leader Development Results

The leadership of LMN did not have a record of workforce and leader development results. The workforce and leadership team were knowledgeable about the work, had at least an undergraduate degree, and were passionate about the organization's purpose. That criterion directed the workforce and leadership team not to pursue any means of workforce or leadership development. The leadership team viewed the workforce and leadership of the organization as already skilled enough to execute the organization's purpose effectively.

Leadership and Governance Results

In this section, I discuss LMN's leadership and governance results by examining the senior leaders' communication and engagement results, governance accountability results, legal and regulatory results, ethical behavior results, and societal well-being and key community support results.

Senior Leadership Communication and Engagement Results

The leadership of LMN assessed its communication and engagement results as very good. The senior leaders lived in proximity to each other and had a good relationship with each other. They communicated in person, by telephone, email, and sometimes by using teleconferencing software such as Zoom. LMN's senior leaders consisted of its board of directors, and they were very involved in organizational processes. The senior leaders engaged in event planning, membership recruitment, membership retention, organization financials, developing partnerships, staff recruitment, staff retention, and ensuring legal and regulatory compliance. The senior leaders and the workforce had a relationship that encouraged transparency in communication and trust, so the leaders and workforce worked effectively together to achieve the organization's purpose. Effective communication and engagement entailed open communication among leaders and the workforce, delegation of tasks, and working together with the workforce to accomplish goals. Ineffective communication and engagement lacked open communication or poor communication, no delegated tasks to avoid burnout, and no assistance to the workforce in any capacity to accomplish goals.

Governance Accountability Results

The leadership of LMN provided governance accountability results. LMN's leaders did a good job of governing the organization based on their engagement with each other and the workforce. The relationship between the leadership team and the workforce encouraged an environment of respectful, honest, and open communication. LMN's leadership participated in every aspect of the organization's execution of its mission, vision, and values. The leadership understood the importance of effective and efficient execution of its mission, vision, and values, and they were passionate about partnering with a workforce that possessed similar goals. Effective, open, honest communication and collaborative efforts to effectively execute the mission, vision, and values indicated good governance accountability results. Ineffective communication and an unwillingness to collaborate to achieve the mission, vision, and values indicated deficiencies in the government accountability results.

Legal and Regulatory Results

The leadership of LMN had good legal and regulatory results. The leadership of the organization ensured that they followed all legal and regulatory requirements. The previous leadership of LMN filed the required documents to establish the organization as an IRS 501(c)(3) nonprofit organization in the state of location and federally. The current leadership kept up with the filings at both state and federal levels. LMN must file an IRS 990, which the senior leadership double-checked before submission. Because of the nature of the organization's work, the organization leaders had other legal and regulatory documentation necessary to confirm compliance. The leadership of LMN was also very responsive to legal and regulatory requirements during the COVID-19 pandemic and ensured the protection of everyone involved in the organization. Completing the necessary filings and remaining compliant with all local, state, and federal legal and regulatory requirements represented good legal and regulatory results. Lack of completion of the necessary filings and the inability to remain compliant with all local, state, and federal legal and regulatory requirements represented poor legal and regulatory results.

Ethical Behavior Results

The leadership of the LMN organization had good ethical behavior results. The organization's leaders believed in transparency, respect for everyone, and open communication. LMN's leaders carried out their mission, vision, and values and followed the necessary guidelines, respected others, practiced transparency, respected the environment, and respected the city. The organization had never received negative feedback based on the ethical behavior of the leadership team. The leadership team boasted of its commitment to ethical behavior. The organization leaders priced memberships and events reasonably and accommodated everyone. Their ethical behavior showed compassion for all and helped to achieve their goal of realizing a diverse organization. Transparency, respect for everyone, respect for the environment, respect for the city, and following legal and regulatory requirements were signs of positive ethical behavior results. Obscurity, disrespect for people, the environment, and the city, and a complete disregard for legal and regulatory requirements were signs of negative ethical behavior results.

Societal Well-Being and Key Community Support Results

The leadership of LMN aligned societal well-being and key community support which resulted from its effective organizational operations. The organization leaders depended on community support to achieve membership goals, diversity goals, and the ability to share the organization's purpose with the community. The community was a supportive component of the organization because it provided the people with historic homes, the people interested in learning about the history of the organization and the city, and the people interested in becoming members. The organization leaders put effort into addressing diversity and made everyone feel welcomed and respected. The organization leaders aligned their events to offer the opportunity to everyone of different backgrounds.

Respect for self, others, the environment, and the city, and collaborating with other organizations and people, within the community, with a common goal represented good societal well-being and community support results. Lack of self-respect, respect for others, the environment, and the city, and inability to collaborate with other organizations and people within the community with a common goal represented poor societal well-being and community support results.

Financial and Market Results

In this section, I examine LMN's financial and market results by discussing its financial performance and marketplace and strategic action plan performance results.

Financial Performance Results

The leadership of LMN understood that their financial performance results were poor. The organization leaders were inconsistent in presenting the financial report during the monthly board meetings. The organization did not have many revenue sources. The leadership team understood that they needed to put more effort into maintaining financial stability. LMN generated revenue from charitable contributions and grants, memberships, and fundraiser events. The leaders of the LMN organization noticed that the expenses were generally higher than their total revenue. The leaders of LMN experienced a struggle with gaining revenue due to the COVID-19 pandemic. During the COVID-19 pandemic, the executive director proposed a no-compensation route to help the organizational leaders cover expenses. The organization leaders had great financial performance results given the organization's assets. Unfortunately, the organization leaders needed to demonstrate probable cause to remove money from their endowment. Table 14 shows LMN's main revenue sources from 2018 to 2020.

Table 14

LMN's Revenue Sources: 2018–2020

	2020	2019	2018
Charitable contributions and grants	$35,422	$50,000	$32,292
Memberships	$8,300	$19,659	$21,771
Fundraiser events	$0	$4,650	$3,250

For 3 years, the LMN organization leaders could not cover 100% of expenses. Table 15 compares the 3 years and their income to revenue comparisons.

Table 15

LMN's Revenue and Expenses: 2018–2020

	2018	%	2019	%	2020	%
Revenue	$46,842	100%	$62,658	100%	$48,939	100%
Expenses	$77,358	61%	$73,992	85%	$81,934	60%
Difference	($30,516)	65%	($11,334)	18%	($32,995)	67%

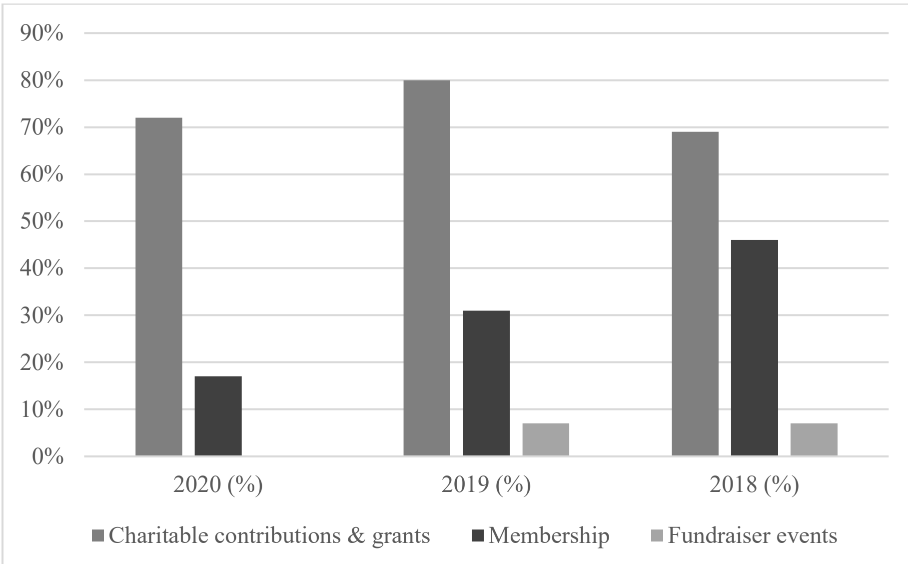
LMN's leaders categorized the expenses into (a) regular expenses and (b) functional expenses. The regular expenses included program services, administration, and fundraising/other. The functional expenses included accounting fees, advertising and promotion, information technology, insurance, interest expense, investment management fees, and legal fees. A healthy financial result consists of diverse revenue sources and less than 100% of revenue covering expenses. An unhealthy financial result consists of limited revenue sources, and when difference between revenue and expenses is greater than 10%.

Marketplace and Strategic Action Plan Performance Results

LMN leaders had fair marketplace and strategic action plan performance results but struggled in some respects. The organization leaders did not have official data collection methods for the marketplace and strategic action plan performance results. However, the organization leaders boasted about how well the organization could perform in its marketplace. The organization was well known to community members, who supported it by becoming members, offered their historic homes as exhibits, and attended events. The organization was well known for its unique brand and the organization leaders used the unique brand for marketing the organization to the community. The organization leaders practiced coloration instead of focusing on competition. The organization leaders collaborated with community members and partners with a common purpose. The organization leaders of LMN understood the importance of memberships. Memberships were one of the organization’s top sources of revenue, as LMN was a membership-based organization. LMN’s leaders agreed that membership should produce higher revenue numbers. If memberships increased, revenue would have increased, and the organization would have had a more sustainable source of income. The organization leaders attempted recruitment and retention strategies a strategic action plan to grow membership and overall, increase revenue. Figure 14 compares the top sources of revenue and how revenue generated by membership dues reflected its performance as a revenue source over three years.

Figure 14

LMN's Main Revenue Sources Comparison



Recognizing and understanding the marketplace, using the organization's brand to market to the target audience effectively, and analyzing main income sources to ensure sustainability are examples of good marketplace and strategic action plan performance results. The inability to recognize and understand the marketplace, incorrectly using the organization's brand, and not creating a plan to maintain income sources are examples of poor marketplace and strategic action plan performance results.

Key Themes

I used the Baldrige Excellence Framework to identify and analyze the main themes from the processes and results. I used the conceptual framework: CMMT. I arranged the main process themes into process strengths and process opportunities and used the Baldrige Excellence Framework as a guide for the four process factors. The Baldrige Excellence Framework uses four organizational evaluation factors, which are (a) approach, (b) deployment, (c) learning, and (d) integration and I used the levels, trends, comparisons, and integration framework for the results strengths and results opportunities (Baldrige Performance Excellence Program, 2019).

Process Strengths

The leadership of LMN had three key process strengths: (a) vision and value setting; (b) legal and ethical behavior; and (c) societal well-being. LMN's leaders demonstrated strength and organizational growth based on these three key process strengths. There was evidence of an effective methodological approach employed by the leadership of the organization.

The leadership of LMN was fully engaged in the key process strengths. There was an effective and systematic approach that addressed the deployment of the key processes, evaluation and improvement of the key processes, and the integration of the key processes into the organization's mission, vision, and values. For example, LMN's leadership understood their organization's vision and values and identified ways to improve upon them. The leadership team worked together to set a vision that organizational leaders could use to connect to the community and its clientele (see Figure 7). Although the leadership team was new to using innovative communication methods, they were willing and ready to try. The organization's leadership team also recognized and understood the need for legal and ethical behavior. For example, the organization's leaders were responsive to legal and ethical processes and fact-checked the organization's public information. LMN also filled its board of directors with individuals who were experts in the different, necessary organizational tasks. The leadership team strove for excellence in its compliance with legal and regulatory requirements (see Table 5). LMN's leaders were intent on ensuring societal well-being and incorporated the need for community into its vision, mission, and values. The organizational leaders exhibited transparency, encouraged collaborative efforts with community members and partners, and provided opportunities for everyone to participate in the organization's mission. The organization's leaders also recognized their own deficiencies and worked towards improving those.

Process Opportunities

Although the leadership of LMN could leverage its key process strengths to achieve organizational goals, the key process opportunities are areas of improvement that the organization should work on to achieve its organizational goals. The key process opportunities for the LMN organization leaders include (a) strategic planning process opportunities; (b) strategic implementation process opportunities; (c) understanding and engaging customers' process opportunities; (d) governance process opportunities; (e) financial reporting process opportunities; (f) workforce capability, capacity, climate, and engagement results measurement opportunities; and (g) opportunity in marketplace and strategic action plan performance results opportunities. The LMN leadership team could improve on these seven key process opportunities. The LMN leadership team did not show an effective systematic approach and, in some cases, no systematic approach to these seven important processes. LMN's leaders struggled to deploy these seven key process opportunities to benefit the organization effectively. LMN's leadership tried but failed with the strategic planning process, opportunities, and the strategy implementation process because of their inability to collect data essential and necessary to implementing the process. The LMN organization did not recognize flaws in the key process opportunities that negatively affected the organization's growth. For example, LMN's leaders became comfortable with the current workforce's capability and capacity. They did not recognize the need for growth. This limited the organization's potential. The organization's leaders lacked marketing skills and knowledge of how to market to a diverse audience. The organizational leaders understood that a diverse membership base would provide inertia for continued increases in the diversity of their organization and could potentially encourage collaborations with other diverse organizations. LMN's leaders face a stagnant membership recruitment and retention rate because of their ineffective marketing strategies and an unwillingness to try new things. Also, the organization's leaders failed to recognize the need to change their financial reporting process opportunities and, thus, severely limited the organization's potential revenue sources. However, if the organization were to consider alternate funding opportunities and revise their funding model this could create exciting new opportunities to grow and strengthen the organization.

Results Strengths

The leadership of the LMN organization exemplified four key results strengths, which are (a) workforce engagement, (b) legal and regulatory, (c) ethical behavior, and (d) societal well-being. The leadership team showed good to excellent organizational performance levels, sustenance of beneficial trends, a benchmark in the leadership, and level of organizational performance results and projections for its clientele. The leadership team of the LMN organization exhibits qualities that present the individuals associated with the organization as doing well in society. The organization's mission, vision, and values align closely with the strengths of the results. The organization's leadership team put effort into intrinsic qualities. For example, LMN's leaders created an environment that is inviting for people that share similar values and that are interested in engagement drivers (see Figure 9). The individuals that are a part of the LMN's team are from different backgrounds with some level of expertise. Everyone on the leadership team had at least an undergraduate degree and gave back their time voluntarily to achieve the organization's purpose. The leadership team also fact-checked itself to ensure correct information. They practiced transparency of information and encouraged honest and open communication. The leadership team ensured that the organization complied with all local, state, and federal regulations. The leadership team had an interest in serving all people in some capacity.

Results Opportunities

Although the leadership of the LMN organization had great result strengths, there were still some issues the organization's leaders should address. The four key results opportunities are (a) satisfaction and dissatisfaction with customer engagement, (b) financial performance, (c) workforce environment, and (d) operational effectiveness. The organization leaders understood the need to assess the performance levels, beneficial trends, benchmark leadership, and organizational performance. LMN's leaders ranked poorly in this analysis. The organization's leaders found it difficult to incorporate the results opportunities into the organization's mission, vision, and values. For example, the organizational leaders struggled to find appropriate measurement systems for their goals. The method that the organization's leaders used to gauge the satisfaction and dissatisfaction of their customers was not dependable (see Table 10). The organization's leaders were also not proficient in obtaining relevant information. The organization leaders showed that they were comfortable with the current opportunities. They did not show interest in expansion or increased growth. LMN struggled with marketing and, more specifically, with marketing to a diverse audience. The organizational leaders understood they needed a diverse membership base, especially in age and race/ethnicity. The organization has an aging workforce, which could eventually contribute to decreased workforce capability and capacity. However, by collecting better demographic data from its members the organizational leaders could become both better aware of its workforce's ability and target campaigns to increase membership. Also, the organization did not have significant revenue, but its revenue levels were higher than its projected expenses (see Table 14).

Project Summary

Nonprofit organization leaders focus on diversifying their board and staff, but membership-based nonprofit organization leaders also focus on diversifying their organizational members. Diverse members become an asset to organizations by providing intangible resources to the organization (Fulton, 2021). Organizational leaders who want to diversify their membership lack a clear understanding of diversity and how it applies to recruitment and retention (Yukich et al., 2019). Burton (2002) advised recognizing individual characteristics even when addressing diverse groups. The goal of organization leaders seeking to recruit and retain diverse members is to recognize and understand the target audience as individuals and implement diverse marketing strategies that enhance effective communication and interaction with the diverse target audience (Burton, 2002; Campbell & Lambright, 2019).

In this study, I assessed LMN's membership recruitment and retention strategies with attention to diverse membership recruitment and retention to realize organizational goals. I used the 2019-2020 Baldrige Excellence Framework to guide my process. The 2019-2020 Baldrige Excellence Framework addressed incorporating leadership into strategy and customers and the processes that impact organizational performance (Baldrige Performance Excellence Program, 2019). I analyzed the capabilities and abilities of the leadership of the LMN organization, its strategy, the measurements, and other components. I obtained data from multiple sources to establish LMN organization leaders' strengths and opportunities. I conducted semistructured interviews with the leaders of the LMN organization to deduce their strategic approach to diverse membership recruitment and retention. I integrated the data with Burton's CMMT to signify how organization leaders could recruit and retain diverse members by recognizing and understanding the individualistic aspect of diverse groups and by applying diverse marketing strategies for the target audience.

The main thematic findings in this study demonstrated the need for recognition and understanding of the target audience and the incorporation of diverse marketing strategies. This study identified several opportunities that the leaders of the LMN organization could use to increase their success in recruiting and retaining diverse members. The results contributed to LMN organization's operational effectiveness and enhanced organizational growth.

Contributions and Recommendations

I completed my doctoral study research and determined relevant contributions and recommendations for business and organization leaders and scholar researchers. I explored nonprofit organization leaders' strategies to recruit and retain diverse members. I identified two major themes that business and organization leaders could use to expand their organizational structure and increase diversity, equity, and inclusion. The two themes, the information presented in conjunction with the themes found, and the review of the professional and academic literature should be a resourceful contribution to business and organizational leaders, and scholar researchers.

I recommend that the members of the professional and academic nonprofit community share and use the results of this qualitative single case study to grow the academic literature on diversity in membership-based nonprofit organizations. My study allowed me to identify the challenges and strengths of nonprofit organization leaders seeking to diversify memberships. I recommend that business and organization leaders take the time to compare the challenges and strengths identified so they can develop their own diverse membership recruitment and retention strategy. I also recommend that scholar researchers expand the research by including multiple case studies and during a time frame that did not include adverse events such as the COVID-19 pandemic. The COVID-19 pandemic affected nonprofit organizations economically; causing a stress of funding for programs and activities that allow organizational leaders to carry out the organization's mission, vision, and values (Johnson et al., 2021). Carroll (2021) pointed out that organization leaders are adapting to the changes that the COVID-19 pandemic prompted. Thus, widening the research should present opportunities for different research perspectives.

Application to Professional Practice

Business and nonprofit organization leaders may increase their knowledge of diverse membership recruitment and retention based on the findings, results, and recommendations of this study. Business and nonprofit organization leaders that want to serve or represent their communities need to understand that diverse member recruitment will enhance cultural competency (Dawkins, 2021). Marketing is a big component of recruitment and retention, and effective marketing strategies could alter decision making (Nuseir & El Refae, 2022). Therefore, business and nonprofit organization leaders rely on effective marketing strategies to recruit and retain diverse members. If business and nonprofit organization leaders emphasize marketing strategies, it could encourage organizational growth. Business and nonprofit organization leaders could obtain relevant information that would provide a pathway to advancing the organization.

Business and nonprofit organization leaders could benefit from the findings, results, and recommendations in this study because of the knowledge obtained regarding processes and practices that could realize organizational growth. Sulik et al. (2022) emphasized the need for diversity as a strategic approach to knowledge building. Knowledge building can impact business and nonprofit organization leaders positively. Business and nonprofit organization leaders can use knowledge-building to increase their competitive advantage in their specific industries, which is the overall goal for business and nonprofit organization leaders.

Implications for Social Change

The implications for positive social change are the benefits to business and nonprofit organization leaders and the communities they serve. Business and nonprofit organization leaders depend on representation. The population is constantly changing as a result of migration and immigration. People embody different characteristics, and this study highlights the importance of recognizing and understanding differences. Recognizing and understanding group and individual differences coincides with the changing world (Kirby & Kaiser, 2021). This study highlights the need to recognize and understand the groups of people within the organization leaders' community. The ability to recognize and understand different peoples and their culture could help business and organization leaders tailor products and services that benefit the people, especially underserved or underrepresented groups.

Discrimination and bias are troubling effects of the changes in the population and could cause individuals to feel as though they do not belong (Hussain & Jones, 2021). Business and nonprofit organization leaders should recognize and understand their own internal biases to better understand how they can impact others. This strategic approach could identify potential discriminatory aspects of an organization or its products and services and address those concerns. Business and nonprofit organization leaders have the capability to be change-makers and address discrimination, stereotypes, and biases in their communities.

Recommendations for Action

I recommend that business leaders, nonprofit organization leaders, practitioners, and academics in both the private and public sectors that influence recruitment, retention, marketing recruitment, and diversity thoroughly engage in the review and analysis of this qualitative single case study and its exploration of the strategies that nonprofit organization leaders use to recruit and retain diverse members. The findings and results of this study depict the challenges and successes faced by nonprofit organization leaders, which depend upon diverse membership experiences. Business and nonprofit organization leaders could make informed decisions based on the findings and results of this study. They could also implement the successful strategies outlined in this study to achieve their organizational goals such as developing an understanding of the people within their community and having a willingness to learn about their community members. Also, business and nonprofit organization leaders can develop targeted marketing campaigns that would highlight the diverse communities that they wish to recruit and retain into their organization.

Practitioners and academics may further their understanding of the challenging and mitigating processes that nonprofit organization leaders use to recruit and retain diverse members. Practitioners and academics can also apply the findings and results to their own research study, which could provide further research about the business problem.

I also recommend that business leaders, nonprofit organization leaders, practitioners, and academics use the findings and results as consultative tools to guide other organization leaders and academics. Organization leaders and academics could present the findings and results as supporting evidence during conferences, panel discussions, and consultations with others in the discipline. This will allow those involved in the discipline to discuss and provide input, which could eventually prompt further research on the matter of diverse recruitment and retention strategies.

Additionally, I recommend that the leaders of the LMN organization continue to build on their strengths and take advantage of their opportunities for improvement. Also, the leaders of the LMN organization should develop strategies to obtain demographic data of their membership base, which could help them to understand their current membership better. The findings and results of this study provide relevant recommendations for actions that are specific to the LMN organization and generalizable to organization leaders and academics in the discipline.

Recommendations for Further Research

The findings and results of this study complement the literature on diverse membership recruitment and retention. There were two limitations of the study based on the LMN organization: the threat of the inability to generalize the findings and results and the threat of the COVID-19 pandemic. Future researchers should consider conducting a multiple case research study with other membership-based nonprofits, nonprofits in different regions of the United States, nonprofits with a limited workforce, and nonprofit organizations with a similar focus as the LMN organization.

Additionally, researchers should consider conducting research outside the parameters of a global emergency such as the COVID-19 pandemic. The COVID-19 pandemic affected many organizations, and the organization leaders could not give a good representation of the organization's capabilities. Also, researchers could use the effects of global emergencies such as the COVID-19 pandemic to expand the research of nonprofit organization leaders who did not struggle during the pandemic and achieved organization success from recruitment and retention. Overall, there is room for expansion of this study and the ability to focus on different aspects of the limitations and delimitations.

Reflections

I started my doctoral journey at Walden University's DBA Consulting Capstone program with background knowledge of nonprofit organizations and anticipated potential challenges. I also had to identify any preconceived biases and use methods to mitigate them. Even though I had a nonprofit organization background, I did not include my views to influence the outcome of this research. I practiced separating myself from the issue to have an objective view.

In the early stages of my doctoral journey, my family experienced tragedy. Tragedy disrupted my journey, and it was a struggle to find the motivation to continue. I also found that managing my time while working full-time, parenting, figuring out life, and dealing with my mental health weighed my ability to continue my journey. Despite the challenges, I sought help, and I persevered.

Although I anticipated challenges, I was excited to participate in the program and tackle a common problem that I identified in membership-based nonprofit organizations in my locality. I learned a lot from this study. The process of selecting appropriate research methods, the data collection and analysis process, and the explanation of the findings from research so it made sense were the highlight of my entire research study process.

Walden University's DBA Consulting Capstone team allowed me to work with a nonprofit organization that depended on membership. The leaders wanted to be a positive representation of everyone in their community. I had a great experience working with the client organization leaders. I had the opportunity to meet the leaders in person and attend one of their events. I built a strong connection with the client leaders, and I hope to continue to assist in any way that I can for them. I felt as though I was able to make genuine changes that would benefit the client organization leaders and other nonprofit organization leaders that want to diversify their membership.

Conclusion

This qualitative single case study explored the strategies that nonprofit organization leaders use to recruit and retain diverse members. I used academic and professional literature and the findings and results of this study to make deductions. My deductions were that (a) marketing is an essential component of successful recruitment and retention, (b) organization leaders need to recognize and understand their audience differences and individualize their differences, and (c) organization leaders need to apply the appropriate marketing strategies for the target audience. Organization leaders who do not understand the individualistic aspect of groups tend to use the same marketing approach for everyone, which does not produce successful results when applied to recruitment strategies (Vayer et al., 2021). Having some knowledge of different groups and subgroups within the locality of the organization and applying a specific marketing approach to reach the target audience benefits organization leaders who seek to recruit and retain diverse members.

I collaborated with the client organization leaders as part of my doctoral journey and found delight in working with them. The organization leaders intrinsically valued equality, social justice, fairness, and inclusion and thus desired to grow a diverse membership. However, due to the outlined opportunities for improvements, they remained unable to realize these organizational objectives efficiently.

This study will benefit academic researchers and organization leaders, especially leaders who depend on memberships to sustain their organizations by using the findings and recommendations to develop and implement positive organizational contributions strategically. This study will also provide positive social change within the communities of the organizations' localities by encouraging representation of the different community groups and creating an environment with a welcoming sense of belonging. Organizational leaders need diversity to remain resilient; resiliency keeps organizations afloat during situations such as the COVID-19 pandemic (Duchek et al., 2020). Diversity represents various aspects of organizational growth; diversity of revenue sources, diversity of programs, diversity of members, and diversity of marketing strategies corroborate the idea that organizational leaders incorporate diversity to enhance organizational performance.

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Appendix: Interview Protocol

1. Introduce myself to the participants and thank them for their participation.
2. Provide a brief overview of the study and its purpose.
3. Explain the interview process and timing.
4. Provide information about member checking for interview reliability and validity.
5. Inform participants of their ability to withdraw from the research at any time.
6. Provide participants with confidentiality assurance.
7. Collect consent to audio record the interview for transcription and analysis.
8. Confirm participants' participation in the study.
9. Annotate the date and time of the interview.
10. Begin the interview, which will last no longer than 60 minutes.
11. Ask the targeted interview questions and probe for more information when necessary.
12. Ask the participant the wrap-up question.
13. Thank the participant again, provide contact information for additional questions and concerns, and stop the recording.

Post Interview Protocol

1. Establish a date for member checking.
2 Complete the interview transcription.
3. Transcribe the interviews verbatim and summarize the key points.
4. Share the transcripts and summaries with participants for transparency and information verification.

5. Establish a follow-up date with participants for questions and comments.
6. Meet with the participants to discuss data interpretations.
7. Make revisions as necessary, resending to participants for validation.
8. When participants validate responses, thank them for their time.

Research Question

What strategies do nonprofit organization leaders use to recruit and retain a diversified membership?

Interview Questions

1. What challenges do you experience when recruiting a diverse membership?
2. What strategies do you use to diversify membership?
3. Of those strategies, which were most effective, and why?
4. Of those strategies, which were least effective, and why?
5. How will you assess organizational diversified membership?
6. How do you assess or evaluate the effectiveness of your recruitment and retention strategies to attain the desired outcomes?
7. Do you have any other information that you would like to share regarding your strategies to recruit and retain diverse members?