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Strategies to Increase Membership in a Canadian Nonprofit Protecting Rights and Benefits of Retired Military Personnel

Bruce requa
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Walden University

College of Management and Human Potential

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Bruce Requa

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

Abstract

Strategies to Increase Membership in a Canadian Nonprofit Protecting Rights and
Benefits of Retired Military Personnel

by

Bruce Requa

MBA, University of Southern California, 1988

BS, University of Colorado, 1973

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

Walden University

August 2023

Abstract

Nonprofit organization leaders with an advocacy mission are increasingly challenged to identify, convert, and maintain their membership base to sustain the effectiveness of their advocacy reach and effectiveness. Grounded in stakeholder theory, the purpose of this qualitative single case study was to explore strategies some nonprofit leaders used to increase membership in a Canadian nonprofit protecting the rights and benefits of retired military personnel. The participants included four leaders of a small nonprofit organization in Ontario, Canada, who have directly or indirectly implemented membership strategies. Data were collected through semistructured interviews, client organizational documents, the organization's website, an assessment of the client organization using the Baldrige Excellence Framework, and public information. The data were analyzed using thematic analysis, which yielded four themes: marketing reach, membership value proposition, nonprofit strategy and mission, and board governance. A key recommendation is for nonprofit organization leaders to define a new veteran-focused strategy and mission that meets the needs of its current stakeholders. Implications for positive social change include the potential to provide membership recruitment and retention strategies supporting the needs of veterans and their communities.

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Dedication

To my three sons for their unwavering support during my doctoral journey, encouraging and supporting my efforts to complete this terminal degree after talking about it for what seems like forever. They are by far the most important people in my life whom I love to the ends of the earth. Throughout the process, my managers and colleagues gave me grace, support, and a ready willingness to participate in many interviews during the core classes. The flexibility they provided gave me much-needed time to complete my studies and made the journey easier.

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Section 1: Foundation of the Study

The 2021–2022 Baldrige Excellence Framework (BEF; Baldrige Performance Excellence Program, 2020b) was the primary instrument used to evaluate this study's client organization. I used the framework to holistically assess the nonprofit organization's processes and performance outcomes. Also, I used Freeman's stakeholder theory to explore the client's specific research question. I was the scholar-consultant for this consulting capstone study, as defined by Walden University, and used a single-case study approach to explore strategies that nonprofit leaders used to recruit and retain dues-paying members in their organizations. Section 1 of the study includes the background of the problem, problem and purpose statement, population and sampling, the nature of the study, research question and associated interview questions, conceptual framework, operational definitions, assumptions, delimitations, and limitations, the significance of the study, and a review of the professional and academic literature.

Background of the Problem

Canadian nonprofit organizations and registered charities provide mission-driven products and services to benefit their citizens' and communities' lives. They provide services to children, disadvantaged populations, education, animal welfare, and pensioners. Phillips and Wyatt (2021) found that these organizations accounted for 10% of full-time jobs, and 8.5% of Canada's gross domestic product. Nonprofit leaders face many challenges in delivering upon their mission, including generating ongoing sources of revenue supporting the organization's operations.

Recurring and diverse revenue sources from multiple actors can improve an organization's sustainability. In modern portfolio theory, revenue diversification is an effective hedging strategy for balancing uncertain revenue streams (Hung & Hager, 2019). The researchers also noted that balancing different revenue streams had marginal benefits and was more harmful in some situations. Nonprofit funding sources are government grants, voluntary donations, generating income, investment income, program revenue, and charitable income (Lu et al., 2019). In addition to a consistent revenue source, nonprofit advocacy organizations relied on their stakeholders for nonfinancial assistance. Zhang and Guo (2020) noted that effective advocacy requires close relationships between the nonprofit, its members, and government officials. One form of revenue is from membership dues (Kim et al., 2021). The researchers found that attracting and retaining organizational dues from paying members was one method for gaining an ongoing revenue stream that provided critical support for delivering a nonprofit's services. In this study, I explored strategies to increase membership in a Canadian nonprofit protecting the rights and benefits of retired military personnel and their survivors. By increasing the organization's membership roster, nonprofit leaders gained a consistent revenue source and ready access to the needs of military pensioners supporting the organization's mission.

Problem and Purpose

The general business problem is that nonprofit leaders' failure to attract new military pensioners and retain them adversely impacted their ability to influence governmental policies regarding pensioners' benefits and rights. The specific business

problem is that some nonprofit leaders lack strategies to increase membership in a Canadian nonprofit focused on protecting the rights and benefits of retired military personnel. Therefore, the purpose of this qualitative single case study was to explore strategies some nonprofit leaders used to increase membership in a Canadian nonprofit protecting the rights and benefits of retired military personnel. I purposefully selected four nonprofit organization board members in eastern Canada for this study.

Population and Sampling

A researcher selects the most appropriate interviewees from the general population. Using semistructured interviews, I collected data from four purposively selected board members of the client organization in eastern Canada. Researchers select from several sampling techniques: convenience, snowball, probability-based, stratified random, and purposive (Zickar & Keith, 2023). Zickar and Keith (2023) further defined purposive sampling as (a) expert (participants are selected based on their expertise or knowledge of a subject), (b) maximum variance (participants are selected to cover a range of experiences), and (c) extreme case (participants selected are outliers from the general population). I used purposive sampling for this single case study and selected the interviewees based on their knowledge of the nonprofit's membership strategies. The selection criteria required that the interviewees were active board members with at least 1 year of service and knowledge regarding the nonprofit's previous and current membership strategies.

I conducted interviews with Microsoft Teams meeting software, which provided a video file and written transcript of the conversations. Qualitative researchers can use

structured, semistructured, and unstructured interviews in person, via the telephone, or online (Alam, 2021). Interviews conducted online provided a convenient alternative to bridge the geographical distance. Also, Gray et al. (2020) noted that remote interviews delivered the same quality results as those conducted in person. I interviewed the four board members remotely, examined internal documents, and reviewed their external-facing website.

Nature of the Study

I selected the qualitative method for this study. Qualitative researchers study individuals' values, beliefs, actions, behaviors, and intentions in real life (Albers, 2017; Aspers & Corte, 2019). Because my objective was to study the participants within their real-life environment, the qualitative method was appropriate for this study. Conversely, quantitative researchers use statistical and graphical techniques to examine relationships within the data to understand similarities or differences (Albers, 2017). Because I did not examine the relationships between variables, the quantitative approach was not appropriate for this study. In mixed methodology, researchers use quantitative and qualitative approaches in a single study (Goodman et al., 2020). Because I deemed the quantitative methodology to be inappropriate for this study, the mixed method was also not appropriate.

Qualitative researchers can choose among design strategies that include phenomenological, ethnographical, and case studies (Yin, 2018). Baxter and Jack (2008) found that the case study approach is appropriate when the researcher cannot influence the participants' behavior, contextual conditions are relevant to the findings, and the

boundaries between context and phenomenon are unclear. When selecting a case study design, researchers must determine whether a single or multiple case study design is most appropriate (Pathirana et al., 2020). I selected the single case study design for this research because my objective was to understand the membership strategies of one nonprofit organization. Also, Tomaszewski et al. (2020) observed that researchers used a multiple case study design for ease of replication, which is not an objective of this study. Phenomenology research focuses on the participants' lived experiences (Neubauer et al., 2019), and ethnography is a design researchers use to study people engaged in their daily activities over time (Aspers & Corte, 2019). Because I was not seeking to understand the participants' lived experiences or daily activities, neither of these research designs was appropriate for the study. Therefore, the single case study design was most appropriate for this study.

Research Question

What strategies do some nonprofit leaders use to increase membership in a Canadian nonprofit protecting rights and benefits of retired military?

Interview Questions

1. What strategies do you use to increase membership in the organization?
2. What are some of the challenges encountered in getting new members?
3. What are some of the challenges encountered with renewing members?
4. What new market segments have you selected for growing membership with other affiliated pensioner groups?

5. How have you addressed the challenges encountered with the growth of members?
6. How do you assess the effectiveness of member acquisition and retention strategies?
7. What is the membership value proposition offered to members?
8. Based on your experience, how effective were the previous strategies?
9. What other strategies would you include or exclude to increase membership?

Conceptual Framework

The concept grounding this study is R. Edward Freeman's stakeholder theory, which reconceptualized the firm's view to account for shifts in the external environment to account for the more extensive number of stakeholders that have stakes in the firm and can influence the organization's actions, resources, and results (Freeman, 1984). Examples of stakeholders in Freeman's stakeholder theory include customers, employees, suppliers, governments, competitors, and consumer advocates. Keremidchiev (2021) found that Freeman's theory defined the organization's purpose to include all stakeholders engaged in value-creation activities. Another benefit of the stakeholder approach to business model development is that it is a valuable tool for generating a broader social impact (Alcaniz et al., 2020). Lastly, stakeholder theory demonstrates corporate responsibility through its actions concerning its stakeholders (Barney & Harrison, 2018). For this study, I used stakeholder theory to help understand the nonprofit's primary groups affecting or affected by the organization, and how nonprofit leaders could engage them to increase their membership and achieve their mission. The

nonprofit can also expect improved resilience and sustainability by including stakeholders in their strategies.

I selected Freeman's (1984) stakeholder theory as the conceptual framework because it helped the nonprofit's leaders understand the critical constituent groups that affected or were affected by the organization's mission. Primary stakeholder groups for my study were the board of directors, the nonprofit's members, Veterans Affairs Canada, and the National Council of Veteran Associations of Canada. Freudenreich et al. (2019) noted that using a stakeholder-based, value-creation framework required organizational leaders to analyze stakeholder relationships and engage them in their purpose. Freudenreich et al. and Valentinov et al. (2018) also noted that this broader engagement improved organizational sustainability. The stakeholder theory helped the organization focus on its critical relationships for achieving its mission. Understanding these relationships enabled the organization to cocreate an improved business strategy delivering higher value and increased sustainability.

Operational Definitions

The following definitions are found in discussions of nonprofit and charitable organizations and are included for ease of understanding. The client organization is a Canadian nonprofit with a different legal structure and reporting requirements than a US-based nonprofit.

Nonprofit noncharitable organizations: These organizations are associations, clubs, or societies that operate exclusively for any purpose except profit. They cannot

provide tax-deductible receipts for donations to the organization (Charities Directorate, 2016).

Registered charity: These charities and public and private foundations are created and registered in Canada with the express purpose of relieving poverty, advancing education, advancing religion, and other purposes benefitting the community. These organizations are authorized to provide tax-deductible receipts to donors (Charities Directorate, 2016).

Organizational stakeholder: Any individual or group that has stakes in the firm and can influence or be influenced by the organization's actions, resources, and results (Freeman, 1984).

Retired military veteran: Also known as a pensioner, these individuals receive a pension for their service with the Canadian Armed Forces (CAF) or Royal Canadian Mounted Police (RCMP; Veterans Affairs Canada, 2022).

Veterans Affairs Canada: The ministry focused on providing benefits and services to former members or family members of the CAF or RCMP (Veterans Affairs Canada, 2022).

Assumptions, Limitations, and Delimitations

Assumptions

Assumptions are the researcher's conscious decisions regarding the research study setting that can influence the research outcome (Theofanidis & Fountouki, 2018). Ellis and Levy (2009) found that assumptions are the study's bedrock, notably those things that appear reasonable and are widely accepted. The primary assumption was that the

board members interviewed provided factual and accurate information, including requested information, to the best of their ability. Second, I assumed that using the 2021–2022 Baldrige Excellence Framework as the business excellence tool would provide accurate information regarding the maturity of the client’s organizational processes and results. Third, I assumed that the organization’s board of directors was knowledgeable regarding the organization’s historical operations and services.

Limitations

Limitations are potential weaknesses related to the research design or other study factors out of the researcher’s control (Theofanidis & Fountouki, 2018). Yin (2018) noted that researchers should describe appropriate methodological qualifiers and limitations to the study. Ellis and Levy (2009) noted that clearly stating the study’s limitations helps other researchers replicate or expand upon the study. The first and second limitations were drawn from Walden University’s guidelines that the consulting capstone research project use a single case study design. Research sources were defined by the Institutional Review Board (IRB) and were limited to leadership interviews and materials provided by the client and public information. A third limitation was that I conducted the project using Microsoft Teams instead of face-to-face conversations because the client organization is located in eastern Canada. Per Walden guidelines, in-person information gathering was not an option. Fourth, much of the available literature focuses on nonprofits based in the United States, which have a different legal and regulatory structure than those in Canada. Lastly, the client organization used a third-party association management agency to manage its day-to-day operations, including finances,

marketing, and general administrative (back-office) work. I did not interview or obtain information directly from them.

Delimitations

The researcher sets delimitations as factors to bind or set limits on the case study to facilitate completion promptly (Theofanidis & Fountouki, 2018). The delimitations can consist of factors and constructs intentionally not included in the study (Ellis & Levy, 2009) that can affect the external validity of the findings. The first delimitation set was the timeframe for completing the study and delivering the recommendations to the client within 2 years of first contact. Another delimitation was that I received most of the information from four board members knowledgeable about the nonprofit organization. Also, I used the BEF to assess the overall maturity of the client organization to develop general recommendations for improving the organization's sustainability. Finally, I selected Freeman's (1984) stakeholder theory as the theoretical framework for evaluating the client organization's business problem related to recruiting and retaining dues-paying members and delivering impact.

Significance of the Study

This study is significant because it may apply to other nonprofit leaders desiring strategies to increase their organizations' membership to achieve ongoing success. Using strategies to recruit and retain dues-paying members, nonprofit leaders can decrease financial vulnerability and attain their mission (Kim et al., 2021). Achieving a steady and robust membership base through effective recruitment and retention strategies can be used by nonprofit leaders to help achieve organizational results (Grothe-Hammer, 2020).

Nonprofit leaders gain financial and nonmonetary support from their dues-paying members.

The results of this study might contribute to positive social change. First, military pensioners will have a more influential advocate representing their interests with the government. Second, membership helps establish a community of like-minded people to share tips and techniques for navigating the existing bureaucracy and improving their quality of life. Third, as the nonprofit increases its reach and impact, organizational leaders may hire staff to support its mission and benefit the local community.

A Review of the Professional and Academic Literature

In this qualitative single case study, I explored strategies Canadian nonprofit leaders used to increase their organization's membership and facilitate sustainability. I selected Freeman's (1984) stakeholder theory as the conceptual framework for this study to provide the lens by which to view the business problem. I reviewed the academic and professional literature using the stakeholder concepts in conjunction with my problem and purpose statements and the research question. The literature review is (a) an essential element in academic research that gathers existing knowledge providing the researcher with a current view of the field (Linnenluecke et al., 2019) and (b) the cornerstone anchoring all scientific and academic research (Taherdoost, 2023). Synthesizing the recent literature on stakeholders and nonprofit organizations provided the basis for subsequent research with the client organization. To gain an in-depth understanding of stakeholder theory's application within nonprofits, I organized the articles as depicted in Figure 1.

Figure 1

Literature Review Structure

I collected articles for this research using the Walden University library databases, Google Scholar, the American Society for Quality website and publications, and government websites. I retrieved articles from ProQuest Central, Emerald Management, EBSCOhost, Research Gate, ScienceDirect, and Sage, limiting the returned articles to peer-reviewed and published no earlier than 2019, with limited exceptions for seminal works or those germane to the research topic. I also utilized Google Scholar's *cited-by-filter* capability to identify additional articles that could slip through my primary search terms. I used the search terms *stakeholder*, *Freeman*, *ladder of citizen participation*, *advocacy coalition framework*, *nonprofit*, *Canadian nonprofit*, *membership*, *advocacy*, *Baldrige*, *performance excellence*, and *business excellence*. To ensure my literature

search was comprehensive, I recorded every retrieved article in a database to eliminate duplication and ensure Doctor of Business Administration (DBA) program compliance. Walden University's DBA degree requirements state that 85% of the literature review material must be peer-reviewed and published within 5 years of expected graduation. The literature review included 130 sources, of which 90% were published from 2019–2023, and 88% were peer-reviewed. Table 1 depicts the literature review source content for this study.

Table 1

Literature Review Content

Content-Type	Total #	Published		% Total (2019–2023)
		Pre-2019	2019–2023	
Peer-reviewed articles	115	8	107	93
Non-peer-reviewed:				
Articles	1	0	1	100
Books	2	2		0
Government websites	7	2	5	71
Nonprofit reports	5	1	4	80
Total	130	13	117	90

Stakeholder Theory

Organizations form an ecosystem of employees, investors, suppliers, governmental officials, customers, and many other constituencies. In 1932, Dodd published his research noting that the corporation's sole function was transacting its business to make a profit for its stockholder members. Almost 100 years later, Gokulan (2021) determined that a corporation's purpose was to generate returns for its stockholders. Keremidchiev (2021) agreed with Dodd's and Gokulan's earlier premise that the primary objective of corporate managers was to increase shareholder value;

however, How et al. (2019) observed that shareholders and stakeholders are distinct. The former stated that corporate managers' objectives were to maximize profit and wealth, and the latter asserted that managers should maximize value creation for all stakeholders.

Researchers exploring the differences between shareholders and stakeholders had implications for organizational leaders. Dodd (1932) remarked that public opinion and the courts were newly considering the corporations' directors' role to include employees, customers, charitable endeavors, and stockholders. He suggested that the industry should proactively recognize a responsibility to its shareholders, employees, and the public rather than the government enacting regulations and laws governing their actions. Expanding the definition of including more than shareholders meant that stakeholders were uniquely disadvantaged (Miller, 2022). Miller also found that constituencies receiving more than their fair share of benefits, whether by conformance to jurisdictional requirements or corporate generosity, were always offset by shareholders receiving less than their fair share. The changing view of a corporate director's role evolved and remained static through much of the early 20th century, focusing on the importance of shareholders as the primary beneficiaries of a corporation and the inclusion of other constituencies having a stake.

With a focus beyond shareholders, the concept of stakeholders gained traction. For example, in 1963, the Stanford Research Institute (SRI) first defined stakeholders as groups with a stake in a corporation's actions (Freeman & Reed, 1983). Building on Freeman and Reed's (1983) work, Freeman (1984) defined a stakeholder as any individual or group who can affect or is affected by the organization's achievements.

Since Freeman's seminal work defining stakeholders, researchers defined stakeholders as individuals and groups that participated in the value-generating activities of the organization (Harrison & Wicks, 2019), every individual or group that could affect or be affected by the organization's actions (Keremidchiev, 2021), and individuals or groups who were affected by or could affect an organization's purpose (Kwestel & Doerfel, 2023). The stakeholder concept evolved from (a) focusing on shareholders, to (b) including groups critical to the organization's survivability, and to (c) including others that can affect or be affected by the organization's actions.

Expanding the definition of stakeholder to include previously tangential groups caused organizational leaders to expand their stakeholder strategies beyond shareholders. Other stakeholder definitions included groups critical to an organization's survivability (Pedrini & Ferri, 2019), as well as those requiring involvement to survive (Keremidchiev, 2021). SRI's original list of a corporation's stakeholders included stockholders, customers, suppliers, bankers, and society (Freeman & Reed, 1983). McGahan (2021) further noted that external stakeholders such as communities, government, investors, customers, and suppliers were critical for organizational sustainability. Expanding on SRI's stakeholder definition, Harrison and Wicks (2019) and Kwestel and Doerfel (2023) noted that an organization relied upon strategically important stakeholders for its success and survival. Freeman and Reed (1983) created two classifications of stakeholders that built upon SRI's definition that were further supported by Mitchell et al. (1997). Mitchell et al. noted that the narrow definition paralleled the SRI description and included individuals and groups the organization depended on for its survival (e.g., employees,

customers, government agencies, and suppliers). From Freeman's and Reed's research, the wide definition defined stakeholders as individuals or groups that could affect the attainment of the organization's objectives (e.g., protest and public interest groups, trade associations, competitors, and those included in the narrow definition). Stockholders are salient stakeholders in commercial or for-profit ventures; however, Freeman's and Reed's wide definition also included other groups relevant to nonprofit leadership.

Nonprofit organizations have multiple stakeholders, sharing some with for-profit organizations and others unique to their mission. Mato-Santiso et al. (2021) found that nonprofit organizations were the epitome of multistakeholder management and included many stakeholders with diverse perspectives. For example, they found that nonprofit stakeholders included board members, volunteers, donors, members, beneficiaries, communities, society, managers, social investors, and paid professionals. Nonprofit stakeholders were defined as individuals or groups that could be affected by or make a claim on an organization's resources, attention, or beneficiary services (Wang, 2021), as well as individuals and groups that could affect or be affected by the organization's success (Plaisance, 2022). Costa and Goulart da Silva (2019) classified nonprofit stakeholders into two groups: primary, which are material to the organization's sustainability, aligning with the SRI definition; and secondary, which could influence or be influenced by the organization, aligning with Freeman's definition. Conaty and Robbins (2021) noted that nonprofit organizations have six primary stakeholders: donors, regulators, beneficiaries, the board of directors, management, and volunteers. Like commercial organizations, nonprofits have stakeholders critical to their mission's

success. A fundamental difference between commercial ventures and nonprofit organizations is shareholders and donors, respectively.

Researchers continued exploring stakeholders' multiple views to better understand each view's theoretical underpinnings. Whether shareholders only, those stakeholder groups necessary for the organization's survival, or anyone impacted or could impact the organization's operations. Valentinov and Hajdu (2019), Plaisance (2022), and Bridoux and Stoelhorst (2022) discussed three mutually supportive stakeholder theories:

- **Descriptive:** This perspective describes the corporation's purpose (Valentinov & Hajdu, 2019), focuses on managerial behavior (Plaisance, 2022), and describes managers' stakeholder management activities (Bridoux & Stoelhorst, 2022).
- **Instrumental:** This perspective identified connections or gaps between stakeholder management and achievement of the corporation's objectives (Valentinov & Hajdu, 2019), focused on relationship efficiency (Plaisance, 2022), and linked stakeholder management and organizational performance (Bridoux & Stoelhorst, 2022).
- **Normative:** This perspective classified stakeholders as individuals or groups with substantive aspects of the corporation (Valentinov & Hajdu, 2019), focused on ethical principles (Plaisance, 2022), and included descriptions of what managers should do based on moral and philosophical principles (Bridoux & Stoelhorst, 2022).

The researchers were consistent in their findings that three mutually supportive theories were used to define stakeholders.

In addition to researchers exploring stakeholder theories supporting academic research and practitioner application, Keremidchiev (2021) reported that the broader definition of stakeholder was instantiated into the Organisation for Economic Cooperation and Development's (OECD) principles of corporate governance and the World Economic Forum's purpose of an organization. Gokulan (2021), Keremidchiev, and Chen et al. (2023) also noted that in the United States, the Business Roundtable's 2019 statement on the purpose of a corporation identified stakeholders as customers, employees, suppliers, communities, and shareholders—a significant departure from shareholders only. Since Dodd (1932) first indicated that society was interested in updating the purpose of the corporate manager to include stakeholders beyond shareholders, the stakeholder concept reached relative maturity with inclusion in these international and domestic forums. These updates to OECD, World Economic Forum, and the Business Roundtable are the result of nearly a century's work by researchers reporting that organizations had a responsibility to their shareholders in addition to their other stakeholders (e.g., board members, employees, donors, volunteers, customers, beneficiaries, communities, government officials, media, and suppliers). The emerging importance of stakeholders, as defined beyond stockholders, fundamentally changed the expectations for organization leaders.

Stakeholder Identification and Salience

Every organization needs stakeholders to achieve its objectives, and leaders are primarily responsible for assessing its stakeholder groups and their salience to the organization's success. From a practitioner's perspective, Miller (2022) found that the stakeholder theory lacked normative criteria by which directors could fairly and equitably allocate benefits across all stakeholders. Vladimirova (2019) observed that organizational leaders must identify the relevant stakeholder groups, their interests, and their relative power, while also assessing whether they are supporters or detractors. It is vital to effectively manage stakeholders to ensure the organization's sustainability.

Organizational leaders must accurately identify and assess their stakeholder groups and determine the effort needed to manage each. Researchers defined stakeholder salience as the priority by which organizational leaders gave to multiple stakeholder claims (Mitchell et al., 1997); a manager's efforts and prioritization of competing stakeholder requests (Tiew et al., 2022); and managers determining the stakeholders that needed attention based on their power, legitimacy of their claims, and urgency (Kwestel & Doerfel, 2023). Kwestel and Doerfel (2023) also found that stakeholder salience was dynamic, and groups could move from non-stakeholder (ignored by organizational managers) to the emergent stakeholder (visible to organizational managers) and stakeholder (granted salience by organizational managers). Mitchell et al. (1997) found that organizational managers' perceptions of salience determined which stakeholders received attention. Plaisance (2022) found that organizational managers defined stakeholder relationships through satisfaction, trust, engagement, and influence.

Identifying stakeholders is the first step to building a strategy, and then determining the most salient stakeholders is critical for sustainability.

Managers relying on their personal beliefs to determine stakeholder salience is not the best approach, given the variance in each person's criteria. Regarding helping managers with a systematic approach to determine salience, Fu et al. (2021), Martin and Phillips (2022), Nie and Lam (2022), and Chen et al. (2023) found that organizations used Mitchell et al.'s (1997) 3-factor framework:

- Power: The extent of the stakeholder's ability to impose its will on the organization through coercive, utilitarian, or normative methods.
- Legitimacy: Assumption that the stakeholder's actions are appropriate within society's norms, values, beliefs, and definitions.
- Urgency: The degree to which a stakeholder's actions require an immediate response from organizational managers.

It makes intuitive sense that organizational leaders can prioritize stakeholders based on whether they exhibit one, two, or all three factors; those with more factors receive more attention. Mitchell et al. (1997) labeled stakeholders as latent (dormant, discretionary, demanding) when possessing one factor; expectant (dominant, dependent, dangerous) when possessing two factors; and highly salient (definitive) when possessing all three factors. Tiew et al. (2022) stated that the stakeholder salience model was tested with business ethics, strategy, project management, and governmental organizations. In many instances, managers could use these published models to determine stakeholder salience; however, some industries could require other considerations.

For example, when Tiew et al. (2022) applied the model to the event industry, they first noted that event stakeholders were individuals and groups that could influence or be influenced by the event—a change in the stakeholder definition from an organization to an event. Tiew et al. also found that the stakeholders for an event were temporary and engaged in a single event, with a new set of stakeholders established for the next event. In addition to Mitchell et al.'s (1997) power, legitimacy, and urgency framework, Tiew et al. found that proximity was a fourth stakeholder salience factor in the event management industry. The authors defined proximity as nearness to and embedded in space, time, practice, or concept. In other words, stakeholders with higher proximity to the event location and life cycle phase (i.e., conceptualization, planning, implementing, staging, and closure) translated to higher salience. The additional event salience factors of power, legitimacy, and urgency provided an excellent baseline framework for practitioners to utilize when establishing degrees of salience with their stakeholders. However, as Tiew et al. noted, specific industries may assign different relative weights to each factor. This example served to highlight that organizational leaders must carefully consider adding other factors critical to assigning correct salience to their stakeholders, which is the beginning of creating a comprehensive engagement strategy.

Stakeholder Engagement and Management

Once organizational leaders defined their salient stakeholders, the next step was developing a strategy for managing these critical relationships. Stakeholder management was based on the belief that the organization could positively manage multiple

stakeholders and described two fundamental principles underlying stakeholder management: (1) the primary objective is to maximize cooperation between all stakeholder groups and the organization, and (2) efficient and effective stakeholder management strategies require simultaneously addressing each group's issues (Sturdivant, 1979). Pedrini and Ferri (2019) observed that stakeholder management was the systematic approach by which the organization established positive and constructive stakeholder relationships that led to integrating their expectations into its business strategy. Organizational managers create opportunities to understand their salient stakeholders' needs to benefit from their participation in helping the organization achieve its objectives.

Stakeholders' needs and relative salience drive their expectations for how organizational leaders work with them. Keremidchiev (2021) noted that establishing mutually beneficial relationships with stakeholders and addressing their interests improved organizational sustainability. Valentinov and Hajdu (2019) found that managers must balance the interests of different stakeholders, considering social and economic goals. Stakeholders are interested in fair treatment for themselves and others, and organizations that treat them well are rewarded with an increased performance which, in turn, also serves the interests of shareholders (Ramoglou et al., 2023). Organizational leaders investing effort to understand the needs of their most salient stakeholders accrue benefits across their organization; however, translating the needs of multiple stakeholders into a comprehensive plan is complex.

The stakeholder plan is one component of the organization's overall strategic plan. Developing a stakeholder management strategy is like creating a marketing plan—knowing your market segments, organizational goals, and resources—and developing the plan (Sturdivant, 1979). Freeman and Reed (1983) found that organizational leaders can follow a 4-step plan to develop their stakeholder management strategy: (1) research the needs of each stakeholder group and develop programs to fulfill them, (2) define approaches to understand the political nature of some stakeholders and methods for responding, (3) proactively address issues rather than reacting to them, and (4) allocate organizational resources to stakeholder groups aligned with their importance. Further, Keremidchiev (2021) found that specific stakeholder strategies were classified into one of four quadrants based on their potential to cooperate or threaten the organization: (1) supportive (high cooperation, low threat) - involve them in the organization's management and initiatives, (2) marginal (low cooperation, low threat) - monitor their reactions, (3) nonsupportive (low cooperation, high threat) - defend (e.g., regulators), and (4) mixed blessing (high cooperation, high threat) - collaborate to minimize the threat. Managing salient stakeholders requires understanding their organizational demands and developing strategies in response.

Stakeholders make demands on the organization and often can compete with those of other stakeholders. Freeman's stakeholder theory enabled leaders to identify organizational stakeholders and prioritize those deserving management's attention (Mitchell et al., 1997). When stakeholder goals are aligned or congruent, they engage more harmoniously with the organization than when their goals are incongruent

(Hollebeek et al., 2022). However, Kujala et al. (2022) found that stakeholder engagement created conflict when there were differences in objectives, expectations, or cultural norms. Challenges in balancing conflicting stakeholder value propositions were classified as easy, complicated, complex, or wicked (Ooi & Husted, 2021). The researchers noted that managers solved easy and complicated conflicts with the organization's existing resources, complex conflicts required collaboration with at least one other stakeholder, and wicked conflicts required collaboration with multiple stakeholders. Organizational leaders must manage stakeholder conflicts ranging from easy to wicked, applying sufficient effort to maintain favorable relationships with the most salient groups.

Martin and Phillips (2022) observed that problems associated with high stakeholder friction included leaders over-allocating value to current stakeholders (e.g., accepting illegitimate or divergent claims) and missed opportunities (i.e., new or less salient stakeholders). For example, Tiew et al. (2022) remarked that tourism event managers paid attention to stakeholders critical to event success or those with a direct working relationship; this narrower focus increased the opportunity for an event manager to overlook essential stakeholders. The researchers also noted that the ephemeral nature of many stakeholder groups in event management increased the opportunity of a manager not recognizing a new salient group. Managing stakeholder friction and competing demands on the organization are doable and require an effective stakeholder management plan. The benefits of minimizing stakeholder friction include improved organizational sustainability and less potential to overlook a salient stakeholder.

Stakeholders can align around an issue as well as an organization. Issue-focused networks evolved based on the need for multiple organizations to present a united front in solving a problem (Sun et al., 2022). An advocacy coalition multistakeholder issue network (MSIN) was formed when wicked problems were too complex to be solved by any public or private entity (Sun et al., 2022) and was a coalition of organizations, media, and consumers formed around an issue rather than an organization (Kwestel & Doerfel, 2023). Sun et al. (2022) further noted that the stakeholders of an MSIN were individuals and groups that could affect or be affected by the problem resolution rather than one organization's success. Multistakeholder issue networks formed around an issue and included a combination of commercial, nonprofit, civil, government, and other entities invested in the solution.

Government and other nongovernmental organizations (NGOs) play a unique role in MSINs. They were critical stakeholders and often had the connections and expertise to amplify the voices of marginalized communities by giving greater salience through the MSIN (Kwestel & Doerfel, 2023). Nongovernmental generalists created connections with other stakeholders aligned with their mission to increase the issue's salience when public attention was low (Sun et al., 2022). Conversely, the researchers found that niche NGOs with recognized expertise in a few areas could not build connections when public attention was low. Instead, they focused on building connections with other niche NGOs when public attention was high. The flexibility of the stakeholder definition and saliency frameworks provides managers with tools to help prioritize their efforts across a broad range of constituencies.

New Stakeholder Theory

Just as Freeman expanded SRI's (1963) stakeholder definition in 1984, researchers continued to use both definitions in their projects. The new stakeholder theory (NST) was based on the argument that organizations working together created more value than working independently (McGahan, 2021). Retolaza et al. (2019) found that NST's focus was creating value for all stakeholders. Stakeholders would remain connected to the focal organization if they received appropriate returns (McGahan, 2021) and organizational managers executed their responsibilities to create social change (Bridoux & Stoelhorst, 2022). Bridoux and Stoelhorst (2022) also observed three foundational beliefs underlying NST: stakeholders were interdependent, people were motivated by self-interest and morality, and the organization consisted of formal and informal contracts. In another view, Retolaza et al. stated that the NST narrative focused on defining the purpose of the firm as the creation of value for all stakeholders and was articulated by the six general principles listed in Table 2.

Table 2*New Stakeholder Principles*

Principle	Description
Value creation	Stakeholders support organizations that provide them with a return, whether it is money for commercial investment or altruistic nonprofit donations.
Human complexity	Complexity is expected because people are multidimensional.
Purpose	Every organization serves a purpose.
Interconnection	Stakeholders had a mutual interest in supporting the organization's objectives.
Cooperation	Stakeholders supporting the organization's objectives cooperated to improve people's quality of life.
Reciprocity	New challenges and related conflicts resulting from closer collaboration improved the organization's value-creation outcomes.

McGahan (2021) found that saliency, asymmetrical bargaining power, inherent rights, and resource contributions complicated the equitable value distribution to each stakeholder in the NST. The NST explicitly promotes the concept of stakeholders as more than just shareholders and focuses on the partnerships developed to provide more value than any organization independently.

Alternative Theories***Advocacy Coalition Framework***

Citizens seek to provide their government with input on various issues that affect them, ensuring that implemented policies align with their beliefs. As a single entity, a government must rely upon other policy actors (i.e., stakeholders) to achieve its objectives (Kim, 2022). The advocacy coalition framework (ACF) was developed by Sabatier (1988) to describe citizen engagement in policymaking. Pierce, Giordono et al.

(2020) found that the ACF synthesized existing top-down concepts, such as legal and socio-economic factors, with a bottoms-up perspective of starting with an analysis of the problem. The ACF relied on coalitions of people with like-minded beliefs advocating with policy analysts for change in government programs (Sabatier, 1988). The advocacy coalition's initial definition consisted of actors sharing core beliefs and coordinating their behaviors in non-trivial ways over an extended length of time to affect a policy subsystem materially (Weible et al., 2019). Pierce, Giordano et al. further observed that policy actors sharing beliefs and coordinating their actions to influence public policy were advocacy coalitions. The ACF is a valuable construct describing the engagement and interrelationships of stakeholders involved in the policy process.

The ACF includes three basic assumptions and three foundational premises. The first assumption was that the ACF views the policymaking process as a competition between advocacy coalitions comprised of people with shared beliefs (Kim, 2022; Satoh et al., 2021). The second assumption, noted by Flores-Crespo and Mendoza Cazarez (2019), was that the ACF depends on the actors, or advocacy coalitions, acting independently. The third assumption was that the ACF was appropriate when applied within a relatively stable ecosystem (Pierce, Peterson et al., 2020). Hence, the ACF recognizes that policy changes result from synthesizing multiple stakeholder coalitions that promote their often-divergent beliefs.

Sabatier (1988) based the ACF on three foundational premises: (1) understanding the potential impacts of policy change requires at least a decade of learning through the cumulative effects of research findings and shared knowledge, (2) interested public and

private stakeholders (i.e., advocacy coalitions) should think about change through the lens of policy subsystems, and (3) public policies act like belief systems created by a foundational set of values. Lee, Choi, and Lee (2021) stated that one of the fundamental premises of the ACF is the need to look at a time frame of at least a decade to ensure that short-term favorable outcomes do not become long-term failures. Given the decades-long time frames involved in policymaking, Kim (2022) and Weible et al. (2019) found that coalition allies and opponents of policy change were relatively stable when addressing controversies in mature policy subsystems. Policymakers and advocacy coalitions require at least a decade to acquire sufficient scientific and ordinary knowledge to craft and implement public policies, requiring stakeholders to take the long view.

The second premise of the ACF highlights the need for stakeholders to focus on policy subsystems as the locus of change. Policy subsystems comprise a defined topic, territorial scope, and policy actors influencing public policy (Lee, Choi, & Lee, 2021). Further, Kim (2022) described a policy subsystem as all public and private stakeholder groups expending effort to influence public policy in an area. Sabatier (1988) found that policy subsystems should include stakeholders from multiple levels of government agencies, legislative committees, policy analysts active in policy formulation and execution, journalists, and public and private organizations interested in the issue. Alignment of political activities was further defined by coordination between allies and between rivals, and building coalitions with allies was one of the most critical activities performed by policy actors (Weible et al., 2019). The consensus among researchers was

that a policy subsystem included multiple public and private advocacy coalitions seeking to impact policies focused on a specific topical area.

The third premise was that public policies were created based on synthesizing the advocacy coalition's expressed core values and are synonymous with an individual's belief system. Flores-Crespo and Mendoza Cazarez (2019) supported this assertion and found that coalitions were held together by individuals with common beliefs rather than shared interests. Also, Lee, Choi, and Lee (2021) stated that policy actors formed coalitions with others who shared their beliefs and were willing to engage in policymaking. Lee, Choi, and Lee and Weible et al. (2019) further defined three levels of belief included in the ACF (i.e., deep core, policy core, and secondary beliefs), with the emphasis on policy core because it is the level at which governments respond to problems or concerns. Noting the complexity of policy development, Lee, Choi, and Lee found that a person's core and policy-level beliefs resist change. However, the actors participating in advocacy coalitions can hold intractable positions based on their fundamental personal beliefs that can take decades of learning and negotiation to reach an acceptable agreement meeting the public's needs best. Policymakers develop public policy by synthesizing the information provided by the advocacy coalitions interested in the policy subsystem.

Sabatier's (1988) ACF, with its three foundational premises, provided researchers and practitioners with an improved capability to understand the dynamics involved in public policy advocacy; however, it is not appropriate for this study. First, the nonprofit's business problem is internally focused on membership, which is different from the focus of the advocacy coalition framework on governmental policy. Second, the nonprofit

organization is small and focused on social advocacy affecting a minority of citizens. Third, the decades-long time frame for influencing change is beyond the nonprofit's capacity to support coalition building and resources for long-term advocacy. The stakeholder theory remains the best conceptual framework for their business problem.

Ladder of Citizen Participation

Government officials seek to craft policies that include input from the needs of the stakeholders affected by them. Arnstein (1969) noted that most people unanimously support citizen participation in their government; it is one of the precepts of democracy. In a precursor to Arnstein's ladder of citizen participation theory, Technical Assistance Bulletin No. 3 noted that neighborhood residents must be confident that their representatives in the model cities program represented their interests. City leaders must ensure their ability to participate in the policy and program planning process (U.S. Department of Housing and Urban Development, 1968). Building from this definition, Arnstein defined citizen participation as the ability of a marginalized community to exert its power concerning social reform—citizen participation meant citizen power. Ianniello et al. (2019) observed that citizen participation in public policy decision-making aims to improve policy outcomes when dealing with complex social problems. Citizens of marginalized communities participating with policymakers is a worthwhile objective; however, the social reality was different during the late 1960s when Arnstein published her seminal theory.

The unclear participation requirement in the model cities program was the genesis for Arnstein's (1969) work defining the concept of citizen participation. She published

the ladder of citizen participation to clarify what constituted participation in the Model Cities program (Gaber, 2019). Furthermore, Gaber (2019) noted that Arnstein focused on the three stakeholders involved in the model city's program decision-making process: governing bodies, private-public coalitions, and the affected neighborhood residents. Arnstein's ladder concept was simple and easy to understand, allowing researchers to confirm its applicability or modify it based on their findings (Varwell, 2022). Defining stakeholders involved in the Model Cities program helped the participants better understand the dimensions of citizen participation.

The definition of participation was different in all instances. The ladder of citizen participation theory includes a three-step continuum of participation (Arnstein, 1969) and eight discrete levels, or rungs on the ladder, by which stakeholders engage in the processes leading to the decisions that affect them (Varwell, 2022). Arnstein's eight-step typology started with citizen control (i.e., the most citizen power) on the top rung and manipulation (i.e., the least citizen power) on the bottom rung—(1) citizen control, (2) delegated power, (3) partnership, (4) placation, (5) consultation, (6) informing, (7) therapy, and (8) manipulation—clearly defining the degree of power awarded marginalized citizens at each level. Varwell (2022) found that the ladder clearly defined power relationships between marginalized community members and more powerful stakeholders. The ladder of citizen participation was a timely and straightforward model to help policymakers and marginalized community members understand the multiple definitions of citizen participation.

Practitioners seeking to give marginalized stakeholders more power in policymaking noticed that the power-sharing defined in the top three ladder rungs (i.e., citizen control, delegated power, and partnership) and expected outcomes from these collaboration levels were only sometimes evident. Ianniello et al. (2019) found that citizen participation led to better solutions, more alternatives, increased accountability and transparency, and solutions localized for their community; however, their involvement did not improve the process's efficiency and effectiveness. When the political establishment constrained marginalized residents' participation in the planning process, the citizens responded by disconnecting from the established process and instead became insurgents (Laskey & Nicholls, 2019). Moreover, the researchers noted that when this occurred, planners needed to engage the insurgents in dialogue, create and follow a fair development process, and partner with them to develop equitable alternatives. The ladder of citizen participation was lacking; however, it remains a foundational theory for public policy development.

Although the ladder of citizen participation is relevant to the nonprofit's advocacy objective of getting citizens engaged with policy changes, more appropriate theories exist for this study for two reasons. First, the nonprofit's primary business problem is recruiting and retaining membership in the organization, and second, the nonprofit's target beneficiaries are not marginalized citizens. As nonprofit leaders develop their membership strategy, a crucial element is the degree of power they elect to share with their membership base related to their advocacy efforts. Stakeholder theory remains the

most appropriate option for this study and encompasses critical groups such as government officials, nonprofit members, board members, funders, and beneficiaries.

Nonprofit Organizations

Nonprofit organizations fulfill a societal need that other institutions do not fill. Kim et al. (2021) and Turpin et al. (2021) observed that nonprofits were included in the “third sector” of the economy; the other two sectors were for-profit organizations and governments. Governments relied upon nonprofit organizations to deliver social services (Clement, 2019) and develop solutions to societies’ social problems (Nardini et al., 2022). For example, several researchers found that nonprofit organizations delivered public benefits in areas not covered by the government, such as health care, disaster aid, education, social services, sports, and protecting the environment (Rosnerova & Hraskova, 2021); and colleges, houses of worship, healthcare organizations, museums, social enterprises, and other nonprofit entities (Moura et al., 2019). Turpin et al. noted that governments increasingly rely on nonprofits to develop solutions to widespread social issues. Nonprofit organizations are essential for the development of society (Perić et al., 2020), and Cestari et al. (2022) remarked that the number of nonprofits increased to support an ever-increasing quantity and more complex social problems that governments were unable to address. Nonprofits, or the third sector, are labels applied to organizations focused on improving society through delivering services, advocating for their beneficiaries, or both.

Nonprofit organizations are different from for-profit companies in several ways. First, Bocquet et al. (2020) noted that nonprofits operate to serve society rather than earn

profits for their shareholders. Nonprofits also met social needs not provided by the government and delivered products and services that met social needs rather than generating stakeholder profits (Gee et al., 2022). The authors also found that nonprofits and for-profits differed concerning organizational objectives, acquisition and disposition of financial resources, human resources (i.e., composition, employee values), and leadership and governance. Gee et al. (2022) also noted that nonprofits are uniquely different from for-profit organizations in receiving donations, whereas for-profit organizations rely on commercial transactions. Compared to for-profit companies, nonprofits are more complex, they operate in a challenging multistakeholder environment and strategic process, and most critically, their value lies in achieving social value rather than profit (Sanderse et al., 2020). Beyond the profit difference, Beaton et al. (2020) and Vehka and Vesa (2022) found that a primary function of nonprofits is to facilitate civic and political engagement. Managing complex relationships consisting of the public, regulators, employees, beneficiaries, and other stakeholders requires deft leadership skills to enhance the nonprofit's relationship in the community.

A critical component of an organization's reputation is the trust bestowed upon it by its stakeholders. Becker et al. (2020) found that the most valuable asset for a nonprofit is public trust and defined trust as the nonprofit's ability to meet stakeholders' expectations for reliability, credibility, and reputation. A benefit of trustworthy nonprofits was that they received more individual donations than those that were not trustworthy (Gee et al., 2022). Also, nonprofit leaders that built high-quality stakeholder relationships delivered improved social impact, and board members supplied more resources

supporting the organization's mission (Plaisance, 2022). Retaining the public's trust is critical to a nonprofit's ability to get appropriate funding and resources by which it can pursue its mission.

Canadian Perspective

The Canadian national government regulates nonprofit sector organizations, stipulating benefits, and requirements for conforming with relevant regulations. Bloodgood et al. (2023) found that some countries distinguish between nonprofit and charity, providing extra tax benefits to the charity. Canada is one such country where the distinction is critical. The Charities Directorate (2016) is responsible for the governance of Canadian nonprofit organizations classified as charitable or noncharitable. Charities are further classified as charitable organizations, public or private foundations created and resident in Canada. Cameron and Kwiecien (2019) found about 170,000 nonprofits, of which about 85,000 were charities. Other researchers found about 75,000 charitable organizations and 5,000 public and 6,000 private foundations (Phillips & Wyatt, 2021), and a year later, Aptowitz (2022) counted about 85,000 charities and an equal number of noncharitable nonprofits. The researchers coalesced that Canada had about 85,000–86,000 charities with an equal number of noncharitable nonprofits. The most recent census, Statistics Canada (2021), showed that the nonprofit sector employed 2.5 million people, representing almost 13% of all jobs. This distinction between charities and noncharitable nonprofits has significant implications for those organizations' resident in Canada.

Charities and noncharitable organizations fulfill different societal needs in Canada. Phillips and Wyatt (2021) stated that registered charities were required to have charitable goals described in common law, based on the 1891 Income Tax Special Commissioners vs. Pemsel ruling. The Charities Directorate (2016), Cameron and Kwiecien (2019), McMillan (2020), and Singer (2020) found that the 1891 ruling instantiated the four categories (i.e., poverty relief, advancement in education, advancement of religion, other purposes beneficial to the community) into Canadian law such that charities must use their resources for charitable activities and have charitable purposes. Addressing noncharitable nonprofits, McMillan noted that the Charities Directorate governs these organizations, which are organized and operated exclusively to improve society or any other purpose except profit. To gain charitable approval from the Canada Revenue Agency (CRA), the organization goes through a two-step process, first registering as a nonprofit (Aptowitz, 2022) and then meeting the stringent public benefit tests (McMillan, 2020) to gain charitable status. Although similar in their purpose, charities and nonprofit organizations are treated differently by Revenue Canada.

Aptowitz (2022) found that registered charities and nonprofits pay no tax on their revenue. Further extending the favorable tax treatment, McMillan (2020) noted that Canadian noncharitable nonprofit organizations were virtually exempt from income taxation regardless of the source—grants, donations, active or passive business, or property. Searing and Grasse (2022) noted that all Canadian charities annually complete specific sections of Form T3010 based on their size and capital structure. In contrast, Phillips and Wyatt (2021) noted that noncharitable nonprofits were less regulated and had

minimal public reporting requirements. Whereas both types of nonprofits were exempt from income taxation, their ability to issue tax-deductible donation receipts was divergent.

For nonprofits with the appropriate mission, receiving charitable status must be pursued separately with the Canadian government. Once the CRA provided the nonprofit with a charity registration number, the organization issued tax receipts to donors granting them the ability to apply a credit to their tax returns (Phillips & Wyatt, 2021; Turpin et al., 2021). Noncharitable nonprofits do not enjoy the same benefit, and individuals and organizations that donate to these nonprofits are not eligible for income tax relief (Aptowitz, 2022). According to McMillan (2020), noncharitable nonprofits needed to identify revenue sources that were not donation-based because they could not provide the donating person or company with a tax receipt. Canadian noncharitable nonprofits generated most of their revenue from sales of products and services rather than donations (McMillan, 2020). Developing an organizational strategy that leverages the best legal structure is critical to the services delivered and potential sources of revenue.

Governance

Nonprofit leaders and boards of directors have a critical role in the effective operations and governance of the organization. Unlike for-profit companies, nonprofit leaders manage the dual objectives of operating a sustainable organization and delivering on its social mission (Blevins et al., 2022). Lincoln et al. (2019) found that organizations are experiencing more significant changes in their operating environment than ever before. Merrill (2020) and Rimita et al. (2020) described these environments as volatile,

uncertain, complex, and ambiguous (VUCA). The need for influential nonprofit leaders and board members has never been greater. These unpredictable changes in the environment make leadership skills critical for organizational survival. Leadership, not management, is needed to navigate the new post-COVID environment (Singhal, 2021), and organizational leaders without skills for operating in VUCA environments fail more often (Rimita et al., 2020). However, Mason and Kim (2020) found that nonprofit boards with effective governance practices saw improved organizational performance. Nonprofit leaders and board members are crucial to developing and implementing governance programs that deliver upon their organization's social mission and improve its sustainability.

Understanding specific boards of directors' responsibilities is critical, especially given Blevins et al.'s (2022) findings that nonprofit organizations have less external oversight than for-profit companies. Also, they described organizational governance as the sum of structure, processes, and institutions that nonprofit leaders use to allocate resources. Critical board activities were financial oversight and executive director monitoring (Blevins et al., 2022; Dula et al., 2020; Mason & Kim, 2020). Dula et al. (2020) also observed that nonprofit boards participated in developing the organization's strategic direction. Another approach by Boland et al. (2022) found that nonprofit board members had three fiduciary responsibilities: (1) care, which was using common sense and good judgment, (2) loyalty, or placing the organization's interests first, and (3) obedience that required a focus on the nonprofit's mission. Nonprofit board members also evaluated the organization's compliance with the mission, attracted donations,

communicated with community stakeholders, affirmed funds were used appropriately, and ensured legal compliance (Bloch et al., 2020). Nonprofit organizations with board members that sat on multiple boards used more extensive governance practices, improved their organizational performance, and sustainability (Yoon, 2022). Board members' responsibilities are broad and focused on ensuring the nonprofit is well-managed, delivers on its mission, and generates sufficient revenue to fund continuing operations.

The performance of nonprofit board duties requires capabilities different from managing a for-profit venture. Individuals joining nonprofit boards were committed to their mission rather than a for-profit organization's increased profits and shareholder returns (Bloch et al., 2020). According to Lincoln et al. (2019), there were eight essential characteristics for board members fulfilling their fiduciary responsibilities: (1) passionate about the mission, (2) engaged with the organization, (3) providing a strategic focus, (4) practical, (5) respected and monitored regulatory requirements, (6) conscientious use of resources, (7) accountable and transparent, and (8) openness to new approaches and views. Board members are visible members of a nonprofit organization's leadership and governance structure and must have capabilities that help them, and the nonprofit succeed. Towards this end, nonprofit leaders develop strategies to solicit revenues enabling the success of the dual objectives of delivering on its social mission and organizational sustainability.

Nonprofit organizations receive funding from multiple sources and seek to apply as much of the revenue as possible to fulfill their mission. Towards this end, Ki and Cho (2021) found that nonprofit organizations relied upon multiple revenue sources such as

membership dues, donations, grants, product sales, and government funding. Also, nonprofit staff sought donations, grants, subsidies, and, when permitted, selling products and services (Moura et al., 2022). According to Hung and Hager (2019), a financially solvent nonprofit had adequate equity to fund operations, experienced positive operating margins, and included differentiated revenue sources. The researchers also noted that nonprofit leaders diversifying their revenue sources reduced financial risk, enhanced autonomy of actions, gained visibility to new audiences, and strengthened their ability to survive a downturn. In an affirmation of effective governance, Blevins et al. (2022) found that independent boards, greater leadership oversight, increased transparency, and more overall governance contributed a higher percentage of its revenues to accomplishing its mission. Researchers reviewing the literature observed that revenue diversification was preferable to single-source funding to minimize the impact of any single funding source decreasing or eliminating its contributions.

There is a cost to managing multiple funding sources that nonprofit leaders need to consider as part of their revenue strategy. Hung and Hager (2019) noted that diversified revenue streams bring potential disadvantages to the organization, such as increased risk, higher administrative costs, donor perception that other funding is unnecessary, and mission drift. Managing multiple forms of giving increased administrative costs and maintaining the options should only be kept if the revenue exceeds the cost (Kim et al., 2021). Nonprofit leaders invest significant time and effort to ensure the organization achieves the optimal balance of good revenue sources to remain sustainable and deliver on its social mission. Board members who clearly understand

their funding sources and organizational objectives are better positioned to establish a performance management system that meets their needs.

Nonprofit and for-profit performance management systems share many attributes. Moura et al. (2022) found that performance management systems' drivers are the same in for-profit and nonprofit organizations: financial reporting, achievements, controls, and continuous improvement. The researchers noted that nonprofits also needed to include social return on investment that measured their mission's social, economic, and environmental impact—which is challenging to report. Performance measurement systems could not be generalized across the types of nonprofit organizations studied; hence they were more focused on meeting their key stakeholders' expectations (Moura et al., 2022). Benefits accruing to the nonprofit through effective financial, regulatory, and mission accomplishment reporting included transparency and increased donations.

Transparency in reporting, especially concerning the nonprofit's mission, is critical. Nonprofit members expected social reporting to be helpful, complete, transparent, and verified by independent organizations (Costa & Goulart da Silva, 2019). For nonprofits to receive funding from stakeholders, the organization must be perceived as legitimate, transparent, effective, and efficient (Cestari et al., 2022). As described earlier, impact measures are challenging to report given that the results may only be visible long-term; however, impact measures were essential for the nonprofit to increase investments, attract new donors, and improve its legitimacy (Moura et al., 2022). For example, Figenschou and Fredheim (2019) noted that policymakers, government officials, and the public need visibility into the nonprofit's mission effectiveness.

Understanding stakeholder requirements and creating a performance management system that provides appropriate information can be challenging, given stakeholder diversity and competing resource needs. However, providing key stakeholders with the correct information ensures compliance with jurisdictional requirements and organizational transparency for donors.

Nonprofit Sustainability

Nonprofits providing benefits to society must engender support from their stakeholders to continue delivering impact in their communities. Sustainable solutions to today's pressing challenges involve complex and intertwined social, economic, and ecological systems (Zimmermann et al., 2022). Engaging individuals and strengthening networks affects a nonprofit's success in achieving its goals (Sun & Asencio, 2019), and nonprofits need to be adaptable; through adaptability, they can develop new long-term strategies for survival in the post-COVID-19 environment (Olawoye-Mann, 2021). Nonprofit organizations emerging from the pandemic are different from those that entered, having either gained new capabilities or pivoted their business models to continue operating and delivering their services. Salient stakeholders for an advocacy-focused nonprofit are its members magnifying the organization's reach and topical knowledge, funders providing financial resources, leaders, coalition members, and board members.

Membership

Organizational membership has several definitions depending on the context of its use. Grothe-Hammer (2020) found that membership was defined as people who were

affiliated with an organization. Employees are one of the most visible members of an organization and, in return for employment benefits, agree to the employer's expectations. For this research study, the two primary stakeholders of the organization are the board of directors and individuals supporting the nonprofit through participation in its membership program. This definition of membership also defined nonmembers as those individuals that did not affiliate with the organization (Grothe-Hammer, 2020), although they may support it philanthropically. However, not all members of an organization can be easily defined. Grothe-Hammer and La Cour (2020) found that the definition of organizational membership that included members and nonmembers was taken for granted for years. The authors found that new organizations have emerged for which membership is organic and not easily defined, such as hacker collectives and terrorist networks.

As the membership became harder to define, other approaches emerged. For example, Grothe-Hammer and La Cour (2020) suggested that the definition of membership needs to be updated and that organizations are a social system primarily concerned with making decisions. Expanding upon this concept, Grothe-Hammer (2020) found that contributorship is a more appropriate lens and defined it as people with the right to participate in the internal decision processes of the organization. Adding the contributor concept to membership creates three possibilities for a person to belong to an organization: member, contributor, and member-contributor (Grothe-Hammer, 2020). The implications point to (a) members that are not engaged in the organization's internal decision processes, (b) contributors that have limited rights to participate in the

organization's internal decision processes, and (c) member-contributors that are both members and entitled to participate in the organization's internal decision-making processes fully (Grothe-Hammer, 2020). Vehka and Vesa (2022) found that external stakeholders engaged with the nonprofit's decision-making processes improve their advocacy success. Accepting Grothe-Hammer's member, contributor, and member-contributor framework have implications for how nonprofit leadership constructs its organizational and membership structure to support its mission best.

Another pivot nonprofit leaders must address is creating the right environment for individuals to contribute to the organization consistently. Cultural nonprofit organizations obtain funding from several sources and must manage multiple stakeholder relationships, including visitors, donors, funders, and members (Pressgrove et al., 2022). Leaders seeking to maximize funding must balance revenue sources and provide multiple methods for individuals to donate or contribute through membership programs. Kim et al. (2021) observed differences between donors and members: (a) donors only provided financial support to the nonprofit, (b) member-donors were more committed givers than those that were only members or donors, and (c) member-donors supported the organization financially and received a defined set of benefits that expanded with their contribution level. The researchers also noted that member-donors were more valuable to a nonprofit than either members or donors; they gave more, and their contributions increased over time. Individuals can choose when affiliating with a nonprofit organization; they can donate money, contribute to the organization through a defined and potentially tiered membership program, or both.

Nonprofit leaders creating membership programs with benefits desired by the public provide additional opportunities for a person to support the organization financially and through volunteer activities. For example, an individual's membership level in a nonprofit museum was positively related to increased purchases in the museum store and restaurant and higher levels of recommending the museum within their social network (Ebbers et al., 2021). Nonprofit leaders investing in activities that strengthened the member-nonprofit relationship early in the life cycle resulted in higher donations at all lifecycle stages (Fang et al., 2020). People with more group memberships donated at a higher frequency than those with fewer memberships, and the frequency of donations increased with more memberships (Unger et al., 2022). Nonprofit leaders are challenged with establishing the right incentives for donors, members, and member-donors to find their suitable niche in supporting the organization. However, organizational leaders creating multiple avenues for people to support the organization also incur challenges.

Organizational leaders managing several revenue sources, including memberships, add cost and complexity to the nonprofit's operating environment—nonprofits seeking to increase their membership hire professionals and invest in an appropriate organizational structure. A study of an arts-based nonprofit noted that stakeholder management became more complex when it added a membership program, especially when balancing commercial objectives and artistic direction (Ebbers et al., 2021). Further, the researchers observed that corporate sponsors preferred popular exhibits that supported their brand and public relations, while donors preferred educational exhibits that drew a different audience. Nonprofit leaders selecting their

funding sources must carefully consider their choices and potential downstream impacts. Beaton et al. (2020) found that nonprofits with government funding may jeopardize it through advocacy efforts. With more funding sources, the potential for stakeholder conflict increases, requiring more of the leadership's time to manage expectations effectively.

Leaders focusing on membership programs gain additional benefits beyond funding and more so for members who opt-in to receive regular marketing materials. Minguez and Javier Sese (2022) found that nonprofit leaders implementing relationship marketing saw improved organizational and fundraising performance. The authors also noted that relationship marketing increased the path for moving occasional donors to long-term members. Membership also supports the organization in its advocacy efforts. Heylen et al. (2020) found that nonprofits with a dependable connection to their membership base developed better policy views aligned with their members' or broader society's beliefs. The researchers also noted that policymakers demand expertise from nonprofits and often need their staff and the membership's political support for policy changes. Nonprofit leaders with an advocacy focus benefit from membership programs that can increase their formal membership, provide them with an extended reach through relationship marketing and engage them in developing, communicating, and enhancing their policy positions.

Advocacy

Nonprofits deliver services and advocate for supportive policies or a mix of both on behalf of their beneficiaries. Researchers defined advocacy as efforts for or against a

cause that expressed a particular political position (Johansson & Scaramuzzino, 2019) and the skills used to shift public opinion and mobilize stakeholders supporting an issue, policy, or constituency (Janoske McLean et al., 2021). Policy advocacy was defined as activities that promoted or prevented changes affecting their mission (MacIndoe & Beaton, 2019; Zhang & Guo, 2020). Zhang and Guo (2020) identified 11 policy advocacy tactics: (1) conducting research, (2) media engagement, (3) direct lobbying, (4) grassroots lobbying, (5) administrative lobbying, (6) mobilizing supporters, (7) legal challenges, (8) educating the public, (9) building coalitions, (10) educating and registering voters, and (11) providing expert testimony. The researchers also added social media marketing to their study, given its increased use in advocacy. Nonprofit leaders focus on supporting efforts to further their mission, whether actively supporting a given policy direction or opposing existing or proposed legislation. However, a nonprofit's active engagement in advocacy comes with some risk.

Nonprofits with dual objectives of advocacy and providing services on their beneficiary's behalf must balance their limited resources across both activities. Zhang and Guo (2020) found that organizations and individuals were willing to fund worthwhile nonprofit advocacy efforts demonstrating value. The public viewed nonprofits favorably when they participated in advocacy activities when political controversy was absent; however, the benefit was reduced when there was conflict regarding the proposed policy (Bell et al., 2020). Beaton et al. (2020) noted a distinct difference between (a) nonprofits that provided services improving the community (seeing beneficiaries as clients) and (b) nonprofits pursuing advocacy activities that provided political representation and voice

(seeing beneficiaries as constituents). Effective advocacy is related to the organization's resources or internal approach, close relationships with the government or external approach, and a combination of insider and outsider tactics or strategic approaches (Zhang & Guo, 2020). Aligning the right mix of resources to service delivery and advocacy is critical to the organization's sustainability, including selecting the best and most cost-effective approaches.

Nonprofit leaders participating in advocacy have several options, from developing in-house competencies to outsourcing their efforts. Effective nonprofit advocacy relies on three core conditions: dedicated advocacy resources, a political structure providing access to advocacy efforts and threats to hinder efforts, and a combination of internal and external advocacy tactics (Zhang & Guo, 2020). Nonprofit leaders electing to pursue advocacy activities must first assess the readiness of their internal resources to support advocacy and then assess the political opportunity for success. Hall et al. (2019) noted that a critical skill required by the nonprofit staff was to clearly understand the characteristics of the campaign topic and its application to advocacy efforts. Nonprofit organizations pursuing advocacy independently from other organizations must have enough skilled staff to execute their initiatives.

Although insufficient, qualified staff to execute the nonprofit's advocacy initiatives are necessary. For example, MacIndoe and Beaton (2019) found that nonprofit managers engaged in advocacy efforts when government officials were neutral. The researchers also found that nonprofit leaders engaged in advocacy efforts when necessary, the outcome was potentially favorable, and the political structure was more

open than closed. Individual organizations engaged in advocacy activities, and nonprofit coalitions became more predominant policy advocates because they could marshal more resources that expanded the sector's voice on any given issue (MacIndoe & Beaton, 2019). Beaton et al. (2020) identified five service delivery-hybrid structures U.S.-based nonprofit leaders employed for effective advocacy: decoupled, segregated (this approach does not apply to Canadian nonprofit and charitable organizations), outsourced, blended, and service intensive. Leaders selecting the optimal structure and approaches to advocacy also need to determine whether they will utilize digital marketing methods in their efforts.

Commercial and nonprofit organizations develop marketing strategies to support their objectives. Dietrich et al. (2022) defined marketing as processes used by an organization to influence the target audience's behavior. Nonprofits used social media marketing to support their advocacy efforts because the internet provided greater reach online, was less costly than traditional media, and generated greater stakeholder engagement (Mato-Santiso et al., 2021; Seelig et al., 2018). Social media marketing managers using internet-based channels facilitated the spread of user-generated content to broad and narrow audiences asynchronously or in real-time (Seelig et al., 2018). To reach their stakeholders, Rosnerova and Hraskova (2021) observed that nonprofit leaders created a marketing strategy that included email, social media, website, video, event, public speaking, and content. Nonprofit marketers also use Facebook, Twitter, YouTube, and blogs to interact directly with stakeholders to pursue the organization's objectives (Seelig et al., 2018). Nonprofits increasingly turned to digital advocacy to advance their mission (Janoske McLean et al., 2021), magnify their organization's position (Hall et al.,

2019), and build and maintain stakeholder relationships (Sun & Asencio, 2019). These technologies enabled two-way communication between the organization and its multiple stakeholder groups, encouraging them to act, such as advocating for their cause.

Social media tools enable a bidirectional bridge between the organization's leaders and stakeholders. Sun and Asencio (2019) and Lee, Wood, and Kim (2021) found that social media technologies were critical for building and maintaining stakeholder relationships. Nonprofits communicate with their stakeholders for three purposes: information-sharing, community-building, and active advocacy on behalf of the organization (Nelson, 2019). Nelson (2019) also stated that dialogic communication improved online engagement, the viral nature of social media led to reaching new audiences, and organizations tweeted compelling and engaging content that drove retweets. Figenschou and Fredheim (2019) stated that compelling and engaging content led to increased rates of users sharing the organization's messages with others. The literature is clear that social media marketing effectively reaches a nonprofit's multiple stakeholder groups, and nonprofit marketers should become proficient in its use. A comprehensive marketing plan, including social media channels, supports delivering compelling messages through online and offline channels, helps increase the number and quantity of donations, engages in a dialog with members, increases message coverage to those outside the organization's network, and helps mobilize people to support its objectives.

Employing digital technologies supporting advocacy efforts brings additional costs. Hall et al. (2019) found that digital technologies used at scale required the

nonprofit's commitment to staff the function with experts. Other challenges nonprofits face when engaged in digital advocacy include finances, people, social media usage knowledge, leadership and strategies, and stakeholders' active participation (Sun & Asencio, 2019). For nonprofit advocacy to be effective, the organization must be known by those in power, afford other stakeholders visibility to their communications, and offer them a simple way to support the organization's objectives (Figenschou & Fredheim, 2019), influence public opinion and create a dialogue with society (Mato-Santiso et al., 2021), and build coalitions, send targeted communications, and amplify voices (Janoske McLean et al., 2021). Digital strategies should be part of every organization's strategy and are critical for those nonprofits with significant advocacy efforts.

Performance Excellence

In their 1982 groundbreaking book, *In Search of Excellence*, Peters and Waterman introduced the concept of high-performing organizations that generated intense interest from practitioners and academics to understand them further. Peters and Waterman (1982) observed that excellent companies shared eight common traits: action orientation, customer intimacy, autonomy and entrepreneurship, employee productivity, strong values, a clear profile of activity, simple form and low employment, and effectively reconciled the centralized-decentralized tension (Zbierowski, 2020). Alanazi (2020) and Sulistyono et al. (2021) found that performance excellence models provided increased value to stakeholders and improved operational outcomes. To improve their organization's sustainability, leaders adopted a performance excellence framework that provided a holistic view of their organization.

Organizational leaders seeking to improve their sustainability have several excellence frameworks from which to choose. The Baldrige excellence framework (BEF), the European foundation for quality management (EFQM), and de Waal's (2007) high-performance organization model are three recognized frameworks for helping organizations improve their performance. Whether using a business excellence framework such as Baldrige or de Waal's high-performance organizational model, leaders can benefit through their use to enhance their organization's performance. However, leaders should carefully select the best excellence model for their organizations (Rajagopalan, 2021). Rajagopalan noted that an organization benefited by using a model; however, selecting the optimal one delivered benefits faster with better results—organizational leaders using the BEF benefited from its application in their environments.

The BEF was created in 1987 by the U.S. Congress to raise awareness of quality management and recognize U.S.-based companies that successfully implemented a quality management system (American Society for Quality, n.d.; Cook & Zhang, 2019). The Baldrige performance excellence program office stated that it is a public-private partnership whereby organizational leaders dedicated to performance excellence, defined as an integrated approach that delivers increased value to customers and stakeholders, use the BEF to improve their organization's effectiveness and capabilities and enables continuous organizational and individual learning (Baldrige Performance Excellence Program, 2021a). The BEF is an integrated document that organizational leaders can use to describe their approaches to the proven business practices of high-performing organizations (Baldrige Performance Excellence Program, 2021a). The BEF is a living

set of guidelines providing organizational leaders an effective method for achieving high performance.

Since the program's inception in 1987, leaders at the Baldrige program office updated the criteria every 2 years for businesses/nonprofits, education, and healthcare organizations to reflect leading proven business practices (Bailey, 2022). The BEF comprises seven integrated categories: leadership; strategy; customers; measurement, analysis, and knowledge management; workforce; operations; and results (Baldrige Performance Excellence Program, 2020a). Each category includes a series of 'how' and 'what' questions that leaders answered describing their approach to the topic. This process benchmarked their organization with a proven standard (Cook & Zhang, 2019; Parast & Golmohammadi, 2019; Parast & Safari, 2022; Sulistyoyo et al., 2021) and gave leaders a reliable measure of their organizational maturity. This structured BEF assessment provides leaders with a list of organizational strengths and opportunities for improvement they can use to improve their sustainability.

A business excellence model is only valid when leaders can reliably use it to attain their expected results. Research results validated the BEF and its benefit for organizations (Cook & Zhang, 2019; Parast & Golmohammadi, 2019; Parast & Safari, 2022; Sulistyoyo et al., 2021). Parast and Safari (2022) noted a gap in the literature related to the impact of quality management practices on small businesses. Using data from the Baldrige program, they found that small businesses could use BEF to diagnose and improve their business outcomes. The BEF accurately measured business excellence, and organizations pursuing a business excellence award outperformed their peers (Ghafoor et

al., 2022). Organizational leaders seeking to improve their performance have adopted the Malcolm Baldrige performance excellence model (Tettey et al., 2019). The BEF has been tested and proven beneficial to leaders seeking improved organizational outcomes. Setiawan and Purba (2021) further researched the frameworks used by organizations to assess their performance and found that about 50% of them used the BEF across 14 countries. Sulistyo et al. (2021) also observed that 83 countries, as of 2016, adopted business excellence models such as the BEF. Academics have rigorously validated the efficacy of the BEF, and leaders worldwide use it to improve their organizations.

Transition

In Section 1, I explored membership acquisition and retention strategies for this study. Further, I discussed the background of the problem experienced by the nonprofit, researched, and defined the business problem, and established the doctoral study's purpose. I then discussed the population and sampling; the nature of the study; research and associated interview questions; operational definitions; assumptions, delimitations, and limitations; and the significance of the study. Freeman's (1984) stakeholder theory was selected as the conceptual framework, and I conducted a detailed review of professional and academic literature.

Section 2 outlined the study's problem and purpose statements, the researcher's role, and the study participants. Also, I discussed the population and sampling and the researcher's ethical research considerations about human subjects. I provided more information about the research method and design; data collection, analysis, and organizational techniques; and the reliability and validity of the data. My discussion of

these topics provided foundational knowledge of the research parameters leading to the findings that other researchers, practitioners, and nonprofit leaders could use to improve their community impact.

In Section 3, I used the BEF to assess the relative maturity of the client organization's processes and results—essentially a holistic, systematic view of the organization. The organizational profile provided me with a lens to view the organization. This study provides an overview of the organization's services, relationships, governance structure, and strategic advantages and disadvantages of the Canadian nonprofit. I then used the BEF's seven categories of leadership; strategy; customers; knowledge, analysis, and knowledge management; workforce; operations; and results to formulate client strengths, opportunities for improvement, and key themes. Further, I used Freeman's (1984) stakeholder theory to define recommendations helping to resolve the specific business problem defined by the organization. This section concludes with an executive summary, project summary, contributions, and recommendations for future research.

Section 2: The Project

Section 2 includes the problem and purpose statement, a discussion of the interview population and sampling method, and the researcher's role. Also, I discuss the research method and design, research ethics, and data collection instruments and techniques. I used semistructured interviews via Microsoft Teams and document review with four nonprofit board members in central Canada for this single case study. The board of directors' members authorized my access to the members-only section of their website, and board members provided company documents, which I reviewed.

Problem and Purpose

The general business problem is that nonprofit leaders' failure to attract new and retain military pensioners adversely impacted their ability to influence governmental policies related to pensioners' benefits and rights. The specific business problem is that some nonprofit leaders lack strategies to increase membership in a Canadian nonprofit focused on protecting the rights and benefits of retired military personnel. Therefore, the purpose of this qualitative single case study was to explore strategies some nonprofit leaders used to increase membership in a Canadian nonprofit protecting the rights and benefits of retired military personnel.

Role of the Researcher

The researcher's role is to ethically and comprehensively collect the data used in the study. In a qualitative single case study, the researcher is the primary data collection and analysis instrument (Bergmark, 2020; Yin, 2018). During the data collection phase of the research study, I gathered information from the participants using semistructured,

open-ended questions. Yin (2018) found that qualitative researchers needed to ask the right questions, listen carefully, remain flexible, avoid biases, and adhere to ethical principles. The qualitative researcher investigates a phenomenon ethically, in-depth, and with rigorous analysis leading to logical findings (Saldaña, 2018). During the board member discussions, I asked questions that precluded *yes* or *no* answers, instead requiring the interviewees to provide richer responses. During the semistructured interviews with the four board members, I started with a list of nine interview questions designed to elicit their strategies associated with the business problem, listened to their initial answers, and asked follow-up and clarifying questions to obtain salient information. Saldaña (2018) noted that a researcher should assess the interviewees' answers to the research questions through their perspective and value system. Further, I summarized their responses in my own words to ensure my understanding.

Researchers conducting a study involving people need to treat them respectfully and ensure participants are provided with informed consent. The Belmont protocols noted three ethical principles for this research project: respect of persons, justice, and beneficence (Office for Human Research Protections, 2018). Prior to conducting interviews, I ensured that the participants received sufficient information to provide their consent, and that they understood they could withdraw it at any time during the process. As the principal researcher, my role was to ethically gather data from interviews, public records, and documents provided by the client; analyze the data; and present the findings.

My experience in the nonprofit sector is extensive as an active volunteer and a board member for a regional nonprofit. Further, the client organization's mission is to

serve military retirees. I served over 4 years with the United States Marine Corps, providing me with an understanding of the demands placed on uniformed service members. An area I paid close attention to is my understanding of the BEF as gained through 14 years of examining or judging applicants participating in the national program.

As such, I may have developed unconscious biases based on my extensive experience with Baldrige applicants, nonprofit board member work, and previous military service. These biases, if not mitigated, could influence the study's outcomes (Quintão et al., 2020). Further, Quintão et al. found that increasing the reliability of a case study was demonstrated by triangulating findings from several independent data sources. To minimize bias in this study, I utilized an interview protocol, sought evidence from many sources, and used methodological triangulation to substantiate the findings.

The interview protocol is more than a list of questions guiding the conversation—instead, it is a strategic tool providing multiple benefits. For example, Frost et al. (2020) used the interview protocol to progressively narrow the scope of the topics from the preliminary questions asked at the start, to more targeted and detailed questions near the end of the interview. The researchers also remarked that the detailed section of the interview protocol helped participants reflect on specific events and experiences related to the study's phenomenon. Also, an effective interview protocol supports the quality and consistency of the research (Braaten et al., 2020). I carefully constructed the interview protocol to start with straightforward background questions before moving into ones that

were more difficult to answer and required participants to think through their responses, thus providing opportunities for further probing questions.

Participants

The participants in this doctoral study included four board members of a nonprofit organization focused on advocating with Veterans Affairs Canada on behalf of military retirees. The four board members included the president, vice chairman and attorney, treasurer, and executive director. All participants (a) promoted the organization's mission, vision, and values; (b) had operational oversight; and (c) provided their insights on membership growth strategies supporting the organization's mission.

Doctor of Business Administration (DBA) consulting capstone doctoral students fill the role of scholar-consultants and partner with client organizations to assess their performance using the BEF (Walden University, 2022). Walden University pairs the DBA scholar-consultant with a nonprofit or small business that has passed a rigorous selection process and agreed to adhere to Walden's IRB requirements. Also, the doctoral scholar-consultant follows a specified code of conduct in their interactions with the client organization. Walden University provided the initial email introduction to the primary client contact (D. Land, personal communication, January 10, 2022), who introduced me to three other board members involved in the project.

Building trust with client leaders is the first step in the consulting process. Also, when trust is present, researcher-client relationships gain greater reciprocity and dialogue (Bergmark, 2020). The client organization is in eastern Canada, and the scholar-consultant is in Washington State; thus, contact through Microsoft Teams, emails, and

texts was necessary. I initially met with the primary contact for the first 2 months. Then I added two other board members to the Microsoft Teams calls for the next 6 months during the information-gathering phase of the project. Interviewing participants through Microsoft Teams reduced costs and minimized disruption to their day by meeting them virtually in their homes or offices at a convenient time. Gray et al. (2020) identified four strengths of remote video communication technology: convenience and ease of use, the confidentiality of communication, accessibility through computer, tablet, or smartphone, and efficient use of time. Also, the researchers noted that the interview quality was the same, whether face-to-face or online. During this information-gathering activity, I continuously iterated the research process and objectives of the study to develop an extended, respectful, and collaborative working relationship.

Research Method and Design

Research Method

I used the qualitative method in this study to explore membership acquisition and retention strategies that nonprofit organization leaders could employ. Researchers use qualitative methods to understand study participants' complex phenomena, variables, and relationships within their social environment (Aspers & Corte, 2019; Shufutinsky, 2020). Also, Moorley and Cathala (2019) found that qualitative research focuses on understanding a real-world phenomenon by examining the how and why. Qualitative researchers seek to understand the meanings that people assigned to phenomena through in-depth interviews and an analysis of historical materials (Aspers & Corte, 2019) and observations (Quintão et al., 2020). In this single case study, I explored the participants'

lived experiences rather than numerical data; therefore, the qualitative method is appropriate for this study. I interviewed four board members, asked open-ended *what* and *how* questions, coded their responses, and identified themes used in increasing and retaining members that could be relevant to other nonprofit leaders.

The quantitative and mixed-method approaches were incorrect for this study. Quantitative researchers collect numerical data to support a hypothesis (Albers, 2017), focus on understanding the relationships between two or more predetermined variables (Aspers & Corte, 2019), and use mathematical models or advanced statistics to generate findings (Strijker et al., 2020). Mixed-method researchers combine qualitative and quantitative methods in the same study (Lo et al., 2020; Strijker et al., 2020) and require the researcher to master both methods (Strijker et al., 2020). Neither the quantitative nor mixed-method approaches were selected for this study because data collection was limited to qualitative information. Therefore, the qualitative method was the best choice for this study.

Research Design

Qualitative designs include case studies, phenomenology, ethnography, narrative analysis (Moorley & Cathala, 2019), case study, grounded theory, and action research (Bougie & Sekaran, 2019). I used the single-case study design to explore four nonprofit board members' membership acquisition and retention strategies to facilitate their advocacy efforts. A case study researcher collects information about a specific real-life phenomenon, such as a person, organization, or event that the researcher is interested in studying (Bougie & Sekaran, 2019). The case study design is appropriate when the

researcher seeks to answer how or why questions, has minimal control over the phenomenon, and is interested in the contemporary phenomenon (Yazan, 2015; Yin, 2018). Further, an exploratory case study approach was selected when the researcher needed to answer *what*, *how*, and *why* questions (Pathiranage et al., 2020). In addition to Yin's first two points, Baxter and Jack (2008) also noted that a case study is appropriate when it is essential to cover the context of the behaviors studied, and the line between context and the phenomenon is unclear. The case study design was appropriate because I used in-depth, semistructured interviews and document reviews to explore strategies some nonprofit leaders used to increase membership in a Canadian nonprofit protecting the rights and benefits of retired military personnel.

Qualitative researchers can select between single- and multiple-case study designs to answer the questions of *how*, *what*, and *why*. Researchers could select the single-case design when the case was (a) a critical test of the theoretical proposition, (b) the phenomenon studied was unusual or extreme, (c) the phenomenon studied was ordinary, (d) the phenomenon was revelatory (e.g., a topic previously inaccessible to researchers), or (e) it was a longitudinal study of the same phenomenon at two points of time (Tomaszewski et al., 2020; Yin, 2018). Pathiranage et al. (2020) observed that single-case designs were used for testing a single theory or unusual, critical, or revelatory case. Conversely, multiple case study designs were practical when the research objective compared or contrasted findings or noted the similarities and differences between cases (Bell & Warren, 2023). Therefore, the single-case study design with four purposively

selected participants was appropriate for this study because recruiting and retaining members is an expected activity in membership-based nonprofit organizations.

Phenomenology, ethnography, narrative analysis, grounded theory, and action research are other research designs; however, these methods were not appropriate for this study. In phenomenology designs, researchers engage deeply with the data through reading, writing, re-reading, and re-writing iteratively until a clear understanding of the participant's lived experience was determined (Neubauer et al., 2019). Ethnographic studies require that the researcher immerse themselves in the actors' environment to study their actions during their daily activities (Pathirana et al., 2020). Researchers use narrative analysis to describe participants' stories about their lived experiences (Tomaszewski et al., 2020). Researchers using a grounded theory methodology continuously created and tested theories, comparing one to another based on field observations and detailed coding of data (Aspers & Corte, 2019). Action researchers employ a cyclical process consisting of action, evaluating the results, and taking further action (Bougie & Sekaran, 2019). Because this study of membership acquisition and retention strategies was not about understanding the lived experiences and stories of the participants, phenomenological, ethnographic, and narrative designs are not appropriate. Also, this study was not focused on generating and testing new theories; therefore, the grounded theory approach was not appropriate.

Ensuring the quality of qualitative research findings was essential to the study design. Yadav (2022) found that standard guidelines for evaluating the quality of qualitative research do not exist; however, data saturation indicated quality and occurred

when no new relevant information was identified (Busetto et al., 2020; Hennink & Kaiser, 2022; Pathiranage et al., 2020). Data saturation was achieved when sufficient information was available for researchers to replicate the study, new data were unavailable, and coding identified no new themes (Fusch & Ness, 2015). Hennink and Kaiser (2022) found that saturation was achieved in as few as five interviews; however, Campbell et al. (2020) found that small and purposively selected samples were used in qualitative research. Hennink and Kaiser further noted that saturation indicated the research sample was sufficient to understand the phenomenon and, therefore, demonstrate content validity. Interviewing the four nonprofit board members achieved data saturation.

Population and Sampling

Case study designs offer researchers several methods for data collection. Methods include evidence gathered through documents, interviews, archival records, physical artifacts, direct observation, and participant-observation (Yin, 2018), and unstructured interviews, in-depth interviews, and direct observation of people, places, and phenomena (Fusch et al., 2018). I selected semistructured interviews for the primary data collection and document review for the secondary data collection activities for this study.

DeJonckheere and Vaughn (2019) found that semistructured interviews allowed researchers to gather open-ended data, explore the participants' lived experiences, and facilitate subsequent questions to gain further insights into a phenomenon.

Five sampling techniques are available to researchers: convenience, snowball, probability-based, stratified random, and purposive (Zickar & Keith, 2023). The researchers also stated that purposive sampling included experts (participants were

selected based on their expertise or knowledge of the subject), maximum variance (participants were selected to cover a range of experiences), and extreme cases (participants were selected because they were outliers from the general population). For this case study, I purposively selected four board members of the client nonprofit organization that were experts with knowledge of the organization's membership recruitment and retention strategies. Walden Universities' consulting capstone program approved the nonprofit organization, requiring them to sign a DBA research agreement. The nonprofit organization's board members were in eastern Canada, and I was in the western part of the United States, thus requiring use of electronic communication technology for the interviews. Choosing semistructured interviews for data collection and purposefully selecting four nonprofit organization board members with information regarding their membership acquisition and retention strategies provided the data needed to understand their strategies better.

For data collection, I conducted the interviews via Microsoft Teams videoconferencing software that generated a video recording and discussion transcript. Qualitative researchers obtain data from interviews, documents, and observations that can be coded for developing themes (Quintão et al., 2020). Fusch et al. (2018) found that researchers mitigated their personal biases through interview protocols, member checking, and data saturation. Also, larger interview sample sizes did not guarantee data saturation, and researchers focused their efforts on collecting rich (quality) and thick (quantity) data instead of adopting a one-size fits all approach (Fusch & Ness, 2015). According to DeJonckheere and Vaughn (2019), semistructured interviews should be

conducted using an interview protocol with additional follow-up and probing questions. In this study, I used an interview protocol and conducted semistructured interviews designed to elicit the board members' goals, objectives, and operational aspects of the organization pertinent to their membership recruitment strategies. To ensure I minimized my biases and captured the data accurately, I focused on obtaining rich and thick data in each interview, summarized the discussion, and emailed it to the participant for member-checking.

Using an interview protocol and the participants' member checking my interview summaries, I collected sufficient information to achieve saturation. For qualitative studies, saturation is the most significant indicator of rigor (Hennink & Kaiser, 2022). The researchers also noted that small sample sizes in homogenous populations were effective and achieved saturation, determined through one or more strategies: code frequency counts, comparative method, stopping criterion, high-order groupings, or code meaning. I used the code frequency count strategy for this study to assess the achievement of data saturation. Utilizing Microsoft Teams and its transcription capabilities, coding the interviews, and obtaining participant concurrence regarding the transcription accuracy through member checking provided the baseline information to understand the membership recruitment and retention strategies better.

Ethical Research

For this qualitative case study, I utilized several methods to collect data, including the purposeful selection of nonprofit leaders for semistructured interviews. Walden University (2023b) requires all doctoral students to receive IRB approval before

beginning data collection activities. Complying with this requirement, I received Walden University's IRB approval (02-14-22-1066583) on February 14, 2022, permitting me to gather and analyze data from senior leader interviews, internal documents, and publicly available information. In addition to IRB approval, I provided the client leader with a service order agreement, which he signed before beginning the research process. The service order agreement included an overview of the research project, including the estimated duration, statement of scope, expected deliverables, and desired outcomes. Receiving Walden IRB approval and agreement from the client on the project scope provided a starting point for engaging with the nonprofit's leaders.

Individuals electing to participate in a research study do so voluntarily, without compensation or incentives. The researcher ensures that each participant understands the study's objectives, benefits, and risks before including them in a research study, known as informed consent (Douglas et al., 2021; Schupmann & Moreno, 2020). The Office for Human Research Protections (2018) described informed consent as giving study participants the information needed to decide to participate in the research. The *Belmont Report* further defined that the informed consent process included information, comprehension, and voluntariness. Participation in this study was voluntary. Individuals had the right to withdraw during the study by notifying me via telephone, Microsoft Teams, text, email, or other written means and be removed from the study immediately. I emailed each participant a consent form before the semistructured interviews, with instructions to return it stating they agreed to the interview. At the start of the interview, I

verbally confirmed their agreement for the interview and the creation of an audio-visual recording.

Researchers must protect the organizations' and individuals' privacy during the study. Walden University (2023a) DBA guidelines require researchers to blind the client organization's and research participants' identities, ensuring the information collected, analyzed, and subsequently published findings were not traceable to the study participants. Also, Yin (2018) noted that interviewers were obligated to keep individual responses confidential. Bergmark (2020) found that researchers conducting studies involving people followed a strict code of conduct that included informed consent and confidentiality. I always referred to the organization generically as "the nonprofit" and referred to the semistructured interview participants as "Participant 1, Participant 2, Participant 3, or Participant 4" to protect the organization and participants. In addition, I removed any organizational and personal identifying information from the study and stored all research documentation on a password-protected computer. These data are available for 5 years from the study's completion date.

Data Collection Instruments

Academic research requires collecting and analyzing data to determine findings related to a specific phenomenon. For qualitative research projects, the researcher serves as the primary data collection instrument (Fusch & Ness, 2015; Shufutinsky, 2020; Yin, 2018). Evidence collected in a case study can include documents, interviews, archival records, physical artifacts, direct observation, and participant observation (Yin, 2018). To gather initial information, I purposively selected four nonprofit board members to

participate in semistructured interviews. Archival records and publicly available data supplemented the interviews. Further, researchers conduct semistructured interviews to gather data related to the participant's personal experiences, attitudes, perceptions, and beliefs related to the phenomenon (DeJonckheere & Vaughn, 2019). The researchers noted that the characteristics of semistructured interviews included (a) flexibility, (b) iterative nature of the questions, (c) applicability to individuals or groups, (d) scheduled in advance, (e) including participants with knowledge and insights of the phenomenon, and (f) deep exploration of participants' experiences. DeJonckheere and Vaughn (2019) further noted that interviews might be the sole data source for qualitative studies. As this single case study's primary data collection instrument, I conducted semistructured qualitative interviews with four purposively selected board members to elicit their experiences with member recruitment and retention strategies.

I used an interview protocol (Appendix A) for each 60-minute interview consisting of nine *what* and *how* questions to elicit each board member's experiences with recruiting and retaining members. Interview protocols supported researchers in preparing for their interviews (Alam, 2021; DeJonckheere & Vaughn, 2019). During each interview, I listened carefully to participants' answers and asked appropriate follow-on questions to ensure my understanding or encourage them to elaborate on a specific topic. At the start of each interview, I confirmed their agreement to proceed and permission to record the Microsoft Teams meeting. Following each interview, I analyzed the conversation, created a summary analysis from the notes, and sent them to the interviewee for member checking. Qualitative researchers intentionally or unintentionally

bring their unique environment and values to their studies (Fusch et al., 2018). One method researchers used to mitigate personal biases was member checking, a process soliciting feedback from the research participants regarding the researcher's understanding of the data and findings (Busetto et al., 2020; Fusch et al., 2018; Motulsky, 2021). Using an interview protocol, semistructured interviews, and member checking, I collected, analyzed, and validated my understanding of the participants' experiences with recruiting and retaining members.

Walden DBA consulting case study researchers must also gather organizational information consistent with the BEF. The seven Baldrige categories in the framework are leadership; strategy; customers; measurement, analysis, and knowledge management; workforce; operations; and results (Parast & Safari, 2022). I collected organizational data using the overall-level questions from the BEF categories. Before each information-gathering session, I emailed them the Baldrige questions to help them prepare for the discussion. To ensure no context was lost gathering the information, participants verbally acknowledged their agreement to record each conversation assisting in developing the BEF strengths and opportunities for improvement.

Data Collection Technique

This qualitative single case study used the following data collection techniques: semistructured interviews, archival documents, and publicly available information. I used an interview protocol (Appendix A) to conduct each semistructured interview with nonprofit leaders, exploring their member recruitment and retention strategies. I used Microsoft Teams software to record each interview. Semistructured interviews effectively

gathered open-ended data, explored participants' thoughts and beliefs, and investigated sensitive issues (DeJonckheere & Vaughn, 2019). Also, semistructured interviews provided in-depth information about the study's phenomenon (Alam, 2021). Qualitative researchers accept that they bring their experiences, values, and perspectives to their study (Fusch et al., 2018) and bring their biases to the data collection phase (Quintão et al., 2020). Common interviewer problems included ineffective probing, failure to listen actively, and not having a good interview guide (DeJonckheere & Vaughn, 2019). Also, new researchers can inadvertently provide comments that the interviewee perceived as awkward or hurtful (Meyer & Willis, 2018). The primary research method was semistructured interviews, conducted with an interview protocol, to explore each board member's membership acquisition and retention strategies. I knew my conscious and unconscious biases could affect the interviews and subsequent analyses.

Several methods for reducing my bias in this qualitative study were available. Previous studies noted that researcher bias could be mitigated by using a qualitative review checklist (Yadav, 2022), member checking (Motulsky, 2021), triangulation (Fusch et al., 2018; Quintão et al., 2020; Rashid et al., 2019), and use of rich and thick data (Fusch et al., 2018). After each interview, I summarized the discussion's key points and emailed it to the interviewee, requesting validation of the information, including adding, modifying, or deleting content to achieve accuracy. Each interviewee returned the interview summary document, confirming that they had reviewed and edited it appropriately. Member checking is one technique for mitigating bias in a research project, and triangulation is a second method used in qualitative studies.

Triangulation in case study research is met through data collected from semistructured interviews, observation of the phenomenon, and review of documents (Rashid et al., 2019). There are four types of triangulation: multiple data sources, multiple researchers, multiple theories, and multiple methods (Fusch et al., 2018; Quintão et al., 2020). I collected data from semistructured interviews, archival documents, and publicly available documents for this research project—achieving data source triangulation and saturation. Hennink and Kaiser (2022) found that data saturation meant that the research sample was sufficient for understanding the phenomenon and achieved content validity. I also collected rich and thick data during the project. Fusch et al. (2018) defined rich data as detailed, intricate, and nuanced and thick data as quantity. I minimized bias in this project with an interview protocol, member checking, triangulation, and the use of rich and thick data.

Data Organization Techniques

During my doctoral research project, I documented participant interviews with written notes, drafted interview transcripts and summaries, recorded interviews, developed codes, received client-provided documents, and researched and downloaded publicly available information. If not organized well, the research data increases the time required for analysis (Lochmiller, 2021). Hence, the researcher is responsible for ensuring the study's data are usable and available while protecting the privacy of study participants (Borghi & Van Gulick, 2021). The researchers also noted that the most prevalent data organization methods were using a standardized filing system and naming schema. After each interview, I archived the information into file folders corresponding

to membership interviews, email correspondence, recordings and transcripts, and client research materials. I also assigned each participant an alphanumeric indicator (i.e., P1, P2, P3, and P4) to protect their identity before archiving. Protecting and archiving the project data are vital in the research process, as is mitigating researcher bias.

Researchers must be aware of their own conscious and unconscious biases they bring to their research study; reflexivity is one method to help minimize the impact. Reflexivity is the researcher's conscious choice to minimize the impact of their motivations, socio-economic status, values, assumptions, personal experiences, and political and ideological position on the study (Calabria, 2019; Moorley & Cathala, 2019; Rankl et al., 2021). Not only is reflexivity essential to data collection and analysis, but also Rankl et al. (2021) noted that the researchers' assumptions could affect the research design. I documented my reflexive learnings from the project in the client communication journal, a chronological record of my client conversations and impressions.

Walden University requires doctoral students to protect all materials collected and analyzed during the study for 5 years (Walden University, 2022). In addition to the interviews and written papers, I scanned my handwritten notes using Adobe's portable document format (PDF) and saved them with the other materials. I destroyed my handwritten notes after converting them to PDF files. These materials are archived in file folders and stored on a password-protected computer. After 5 years, I will destroy all materials used in this study.

Data Analysis

Once the data were collected, organized, and filed for easy access, I analyzed it. Data analysis consisted of transcription, coding, synthesis, abstraction, and theme development (Busetto et al., 2020). While working with the data, researchers maintained the evidence chain to increase the study's reliability, consistency, and validity (Yin, 2018). One method of strengthening research findings is triangulation of the research data collected and analyzed in a case study (Tomaszewski et al., 2020). Triangulation uses different methods of collecting data on the same phenomenon to gain more insight (Strijker et al., 2020). Fusch and Ness (2015), Abdalla et al. (2018), and Yin (2018) identified four types of triangulation: (a) multiple methods (i.e., methodological triangulation), (b) multiple researchers (i.e., researcher triangulation), (c) multiple perspectives of the data (i.e., theory triangulation), and (d) multiple sources or times (i.e., data triangulation). I used methodological triangulation with this project to correlate the data collected from semistructured interviews, client-supplied documents, and publicly available sources. Ensuring that the data collected during the study were maintained and triangulation used to improve the study's findings, the next step is systematically analyzing the data to identify themes.

Analyzing the data collected during the study is critical in the research process. O'Kane et al. (2021) included coding, verifying, and exploring the data set in analysis, and Busetto et al. (2020) included transcription, coding, synthesis and abstraction, and theme development. Coding and theme generation are the most recognized case study analysis methods (Rashid et al., 2019). They are a good choice for researchers who

clearly understand their research objectives (Braun & Clarke, 2022). Researchers use thematic analysis to discover patterns or themes in the data (Braun & Clarke, 2006; Clark & Vealé, 2018; Lochmiller, 2021). Qualitative studies' results are often represented by themes based on collected data (Alam, 2021; Moorley & Cathala, 2019). Lochmiller (2021) defined a three-step analytic process consisting of (a) ensuring the data are well organized (e.g., setup), (b) becoming familiar with the data, developing the initial codes, and developing categories (e.g., analysis), and (c) identifying themes from the categories (e.g., interpreting). Braun and Clarke (2006) articulated a 6-step process for conducting thematic analysis: understand the data, create a list of initial codes, search for themes, review initial themes, refine themes, and document the results. Although articulated with a different number of steps, both approaches were consistent in the activities required to develop themes from the data.

I used Braun's and Clarke's (2006) approach to develop the themes from this single case study research project. First, I edited the Microsoft Teams transcripts to ensure I understood the data, provided a transcript summary to each interview participant for member checking, and defined an initial list of codes. I then manually coded the interview transcripts using a color-coding system, identified and reviewed the initial themes, refined them as I added new data to the analysis, and finalized the findings. Employing Braun's and Clarke's systematic approach to data analysis gave me the vital few themes most relevant to the client's business problem of membership recruitment and retention strategies. The nonprofit participants reviewed these themes, and I compared them with the membership section of the literature review for accuracy and relevance.

Reliability and Validity

Researchers should consider incorporating trustworthiness into all aspects of their studies. Strategies for improving the trustworthiness of qualitative research included credibility, transferability, and dependability (Johnson et al., 2019; Quintão et al., 2020; Rose & Johnson, 2020; Yadav, 2022). In addition to these three strategies, Johnson et al. (2019), Quintão et al. (2020), and Rose and Johnson (2020) also included confirmability as a fourth strategy. Best practice methods supporting the trustworthiness of a study included clear design rationale, data saturation, ethical considerations, member checking, long-term engagement with study participants, triangulation, peer review, computerized analysis software, audit trail, negative case analysis, interpretation of the results, and practitioner recommendations (Johnson et al., 2019). Quintão et al. further noted that validity and reliability describe the trustworthiness of a case study design. I ensured the study was reliable and valid during my doctoral research project.

Reliability

Qualitative researchers establish the study's reliability and dependability by using a documented and repeatable process from the study design through the final report. Reliability was represented by the rigor of the research (Rose & Johnson, 2020), and the most significant indicator of rigor in qualitative studies was saturation (Hennink & Kaiser, 2022). The reliability of a case study was also demonstrated by triangulating findings from several independent data sources (Quintão et al., 2020). Data saturation and triangulation are inextricably linked in qualitative research, and achievement mutually supports the study's reliability. Fusch and Ness (2015) noted that data saturation occurred

when sufficient information was obtained for researchers to replicate the study, new data was unavailable, and coding identified no new themes. Several researchers defined saturation as the point in the research study when additional information did not generate new codes or themes or materially affected the results (Alam, 2021; Hennink & Kaiser, 2022; Johnson et al., 2019). I interviewed four participants, collected internal documentation, and reviewed publicly available information to achieve the data saturation and triangulation objectives. Further, Hennink and Kaiser (2022) identified five strategies to assess the achievement of saturation: code frequency counts, comparative method, stopping criteria, high-order groupings, and code meaning. I used code frequency counts for this case study and continued my data collection and analysis until no new codes were generated from each subsequent interview transcript. Not only must a study be perceived as reliable, but practitioners and future researchers must also find it valid.

Validity

Qualitative researchers can improve a study's validity by focusing on credibility, transferability, confirmability, and data saturation. Validity was the perceived accuracy of the research project's findings, as determined by the researcher, participants, or consumers of the research (Rose & Johnson, 2020). The researchers also noted that techniques for increasing validity included rich and thick data, member checking, triangulation, reflexivity, prolonged engagement, and an audit trail. Fusch et al. (2018) defined rich data as detailed, intricate, nuanced, and thick data as quantity. Motulsky (2021) found that member checking solicited feedback from the research participants that

validated the researcher's understanding of the data and findings. Johnson et al. (2019) found that researchers establishing ethical and trusting relationships with participants increased the likelihood of gathering the rich and thick data necessary for achieving data saturation. Saturation is a foundational principle assessing the quality of purposive sampling in qualitative research (Hennink & Kaiser, 2022), and triangulation, even with its limitations, can be used by qualitative researchers to improve their study's credibility (Abdalla et al., 2018). I developed trusting relationships with the study participants, used an interview protocol for consistency, provided participants with summary transcripts of interviews and findings, and continued adding data until saturation and triangulation were achieved.

I also maintained a participant communication and reflexive journal, engaged with the primary participants for 18 months, and documented the case study process utilized to generate the findings. A concern for researchers and the end users of the report is the potential bias researchers could introduce into the study. Researchers mitigated personal biases through interview protocols, member checking, and data saturation (Fusch et al., 2018). Reflexivity was the researcher's self-awareness of their position in the research process and how they affected the collection of knowledge (Rankl et al., 2021; Thurairajah, 2019), and was the researcher's conscious choice to minimize their motivations, socio-economic status, values, assumptions, personal experiences, and political and ideological position affecting the research process (Calabria, 2019). Thurairajah (2019) also found that the researcher's reflexivity regarding the methodology strengthened the credibility of the research. External validity was supported by providing

the descriptive or exploratory case study selection rationale, a description of the case study context, and clear articulation of patterns enabling generalization of the findings in future studies (Rankl et al., 2021). I documented the progression from the qualitative case study design through data collection and analysis, resulting in themes and findings in this capstone report. Remaining reflexive, connected with the client participants throughout the project, and providing clear descriptions of the research process promoted the project's validity.

Transition and Summary

In Section 2, I included the study's problem and purpose statements, the role of the researcher, and the study participants. Further, I described the research method and design, extended the population and sample criteria, and described the tenants of ethical research. In qualitative studies, the data collection instrument is the researcher, and I provided more detail on data collection and organization techniques used in the research study. Also, I discussed my approaches to data analysis, reliability, and validity throughout the exploration of membership acquisition and retention strategies. These steps helped ensure that the doctoral study met Walden University's quality standards and that nonprofit leaders could use the findings to improve their community impact.

In Section 3, I used the BEF to develop recommendations for the client organization. First, I defined the nonprofit's key factors using the organizational profile section of the BEF. Then I used the seven Baldrige categories of (1) leadership; (2) strategy; (3) customers; (4) knowledge, analysis, and knowledge management; (5) workforce; (6) operations; and (7) results to identify client strengths and opportunities for

improvement. In the final step, I prioritized the organization's strengths, opportunities for improvement, and resultant key themes based on the nonprofit's key factors—what is important to them. Section 3 concludes with an executive summary, a project summary, outlining contributions, and recommendations for future research.

Section 3: Organizational Profile

Organizational leaders use the organizational profile to understand the core and important components of their operation. The organizational profile establishes the context, or lens, by which the nonprofit can be understood. Also, organizational leaders can use the information included in this section to gain critical insights into their operating environment. Key factors discussed include the nonprofit's vision, mission, culture, core competencies, strategic advantages and challenges, and processes by which its service is delivered (Baldrige Performance Excellence Program, 2020a, pp. A-1). I also used the information from the organizational profile when determining my recommendations, focusing on those areas of critical importance to the nonprofit's board of directors.

The Baldrige Performance Excellence Program (2022) stated that small organizations might rely more on informal verbal communication than documented procedures; however, they must demonstrate that their processes are repeatable and systematic. Across most Baldrige categories, the board of directors does not use systematic approaches to managing the organization, affecting deployment, learning, and integration factors. In instances where systematic approaches are demonstrated, they are noted.

The founders formed the organization with the premise that CAF pensions did not meet the needs of retirees, and active advocacy was required to make improvements. However, improved pension benefits significantly reduced the need for the nonprofit to continue advocating with government ministers as its only activity. Recognizing this

disparity, the board of directors engaged a scholar-consultant from Walden University to provide recommendations using the dual lenses of stakeholder theory and the Baldrige excellence framework.

Key Factors Worksheet

Organizational Description

Through an informal meeting in 1970, five military retirees created the predecessor to the current nonprofit organization. Their inspiration for founding the nonprofit was that finding employment in the civilian sector was difficult—they realized that they were probably not the only retirees facing the challenge of translating their military service into civilian terms. From this chance coffee shop conversation, they formed a nonprofit with a singular focus of promoting and protecting the rights and interests of retired Canadian Armed Forces (CAF) personnel and their survivors. The mission remained the same throughout the nonprofit's history, although its structure and name have evolved. Notable successes were getting military skills accepted by civilian employers, creating the Second Career Assistance Network, and establishing a pensioner's dental plan.

The nonprofit evolved with changes in its environment to better meet the needs of its mission, resulting in an all-volunteer board of directors that leads the organization and serves as its governing body, leadership, workforce, and policy experts. The nonprofit has no employees, and an association management company (AMC) manages its administrative and operational rhythm, including its membership program. The nonprofit's membership continued increasing in its early years, attaining over 1,000 by

the middle of the 1990s. Anecdotal evidence provided by the board members suggests membership never increased beyond 5,000–6,000 and was 3,378 in 2013. Since then, membership has decreased substantially to about 600, resulting in fewer opportunities to hear the voice of its customers (i.e., members), less income supporting the organization's policy efforts, and affecting its ability to mobilize members as part of an advocacy campaign. Gee et al. (2022) observed that advocacy nonprofits increase their political influence by increasing the number of volunteers. Benefits available to the nonprofit's members include a newsletter and access to discounted auto and home insurance policies.

Pensioners' concerns with their retirement benefits initially drove membership growth, especially with the organization's unique focus on protecting their rights and interests. At first, there was a strong need to build a legal fund for advocacy, which encouraged membership growth. The organization's early efforts to improve CAF pensions were successful, along with the government resolving the more important latent issues. The subsequent lack of a pension benefit gap and other well-funded and politically connected organizations similarly focused on protecting the rights of retirees contributed to the nonprofit's decline in membership; however, as administrations or the macroeconomic environment change, the government may seek to modify the benefits unfavorably to military retirees or their survivors.

The organization's board of directors focuses on lobbying the federal government on issues discriminatory to retired CAF personnel, including equal pay for equal rank, the Second Career Assistance Network, and survivor benefits. The nonprofit initially labored with its lobbying efforts and gained traction in the late 1970s, meeting with the Minister

of Defence to discuss several policy changes supporting military retirees. This traction was short-lived when the liberal party lost the next election, and the new administration took a different direction. This was the only time the organization successfully met with an administration member, and an early indicator that they needed an alternative method for effective advocacy. The new direction was partnering with other organizations with similar goals, providing more resources and access to government officials to promote their advocacy efforts. Kwestel and Doerfel (2023) observed that these partnerships, termed multistakeholder issue networks, give marginalized groups greater salience concerning the focal organization. Today, the nonprofit is aligned with two umbrella organizations to advance its agenda with the government. This approach enables the nonprofit to use its expertise in shaping policy; however, it removes them from direct contact with the federal government or its officials.

The board of directors recognizes that at the organization's founding, it was the only nonprofit focused on military retiree and survivor benefits. Today, several other nonprofits have the same focus and are more well-funded, professionally staffed, and have regular meetings with ministers and government officials, thus removing the uniqueness of the nonprofit's mission. Also, informal conversations with retirees indicate that most are satisfied with their pensions and the benefits provided, thus removing the need for dedicated advocacy. Occasionally, board members must address a pension issue, and an individual board member with relevant expertise provides detailed information supporting the organization's position to the MSIN.

The board of directors firmly believes in its mission of supporting military retirees and their survivors and provides critical advisory material as requested. One active example is the marriage over 60 clause in the Canadian Forces Superannuation Act, which removes the survivors' benefits if the service member marries after 60. The nonprofit supports one of its collaborative partners with position papers supporting removing the restriction. Defining a new member value proposition to increase the nonprofit's membership will help this organization continue its advocacy and add new services supporting military retirees, their survivors, and other veterans.

Organizational Environment

Nonprofit leaders must understand their operating and competitive environment to execute their mission successfully. Porter's five forces model (Porter, 2008); strengths, weaknesses, opportunities, and threats matrix; and political, economic, social, technological, legal, and environmental factors analysis tools (Christodoulou & Cullinane, 2019) can help leaders gain a better understanding of their environment. Including these analyses in strategic planning can help them identify new services to maximize their impact. The BEF provides guidelines for examining the organization's products and services; mission, vision, and values; workforce profile; organizational assets; and regulatory environment. The holistic view of the organization through the BEF lens helps ensure that my analysis and recommendations align with the organization's direction and values.

Product Offerings. The primary service offered by the nonprofit is advocacy. Janoske McLean et al. (2021) defined advocacy as the skills to shift public opinion and

mobilize stakeholders supporting an issue, policy, or constituency. Further, MacIndoe and Beaton (2019) stated that policy advocacy includes any activity focused on promoting or preventing policy changes that affect their mission. The second product offered is a discounted insurance plan available to nonprofit members. The nonprofit's customers are its members (i.e., CAF pensioners or their survivors).

Mission, Vision, and Values. The nonprofit's mission is to protect the rights and benefits of retired military veterans with Veterans Affairs Canada. The vision, or the organization's fundamental belief, is that all former members of the CAF deserve to be treated with respect, dignity, and justice by the government they served, regardless of when or where their service occurred. The mission and vision guide the board of directors in setting the organization's direction in protecting military pensions.

Workforce Profile. The board of directors leads and manages the nonprofit as its leadership, operational, and advocacy workforce. Board members support the nonprofit's advocacy efforts, mainly through its partnership with MSINs. The association management company addresses the day-to-day activities of the nonprofit, such as back-office administrative services, taxes, professional certifications, website development, marketing, membership management, and governance and board support. Board member profiles are included in Table 3.

Table 3*Board Member Profiles*

Name and Title	Joined	Gender	Ethnicity	Pensioner	Province
Chairman	2021	M	FN	Yes	Ontario
Vice-Chairman of the Board	2016	M	C	No	Quebec
Treasurer	1997	M	C	Yes	Ontario
Executive Director	2011	M	C	No	Ontario
Vice-Chair, Administration	2018	F	C	No	Ontario
Vice Chair, Communications	2022	F	FN	No	Ontario
National Secretary	2012	F	C	No	Ontario
Vice Chair, Military Widows	Open				
Vice Chair, Membership	Open				

Note. Ethnicity is First Nations (FN) or Caucasian (C) and pensioners are recipients of a CAF pension (Yes).

Assets. The nonprofit operates virtually and does not have a physical office, equipment, or tangible assets. The organization's principal assets are the board members' intellectual property gained through decades of military service and advocacy. The organization is well-funded, with sufficient cash and investments to continue operating in perpetuity without changes to its mission or activities. This financial strength, combined with the board members' deep experience in military service, provides them with flexibility to explore additional services.

Regulatory Requirements. As a Canadian nonprofit, the organization complies with the laws and regulations governing these organizations. An important distinction is that the organization is a noncharitable nonprofit, not a registered charity. The Charities Directorate (2016) stipulates that nonprofit organizations are organized and operated exclusively for social welfare, civic improvement, pleasure, recreation, or any other

purpose except profit. Registered charities in Canada can provide tax-deductible receipts for contributions, whereas contributions to a noncharitable nonprofit are not considered charitable donations. Canadian noncharitable nonprofits are virtually exempt from income taxation regardless of the source—grants, donations, active or passive business, or property (McMillan, 2020). The organization also files annual tax returns complying with Revenue Canada’s requirements.

Organizational Relationships

Organizations provide products or services to customers, whether they seek profit (e.g., commercial), improve their communities (e.g., nonprofit), or provide public services (e.g., government). Pursuing their objectives involves its stakeholders.

Freudenreich et al. (2019) noted that a stakeholder-based value creation framework requires organizational leaders to analyze stakeholder relationships and engage them in cocreating the organization’s purpose. The information in this section of the organizational profile describes the nonprofit’s relationship with its key stakeholders.

Organizational Structure. The client is a Canadian nonprofit organization governed by a seven-member board of directors consisting of a chairman, vice-chairman of the board, secretary, treasurer, vice-chair administration, vice-chair communications, and executive director. The board of directors (Table 3) is responsible for all aspects of the nonprofit’s governance and operational activities, including financial oversight, legal and regulatory compliance, stakeholder management, and membership. Also, four board members are former military and bring deep knowledge of the needs of this cohort, along with the difficulties they face in attaining the benefits to which they are entitled. Board

members are not compensated and volunteer their time to the organization. The board members also serve as the organization's leadership and workforce; there are no paid employees or volunteers. The directors are elected annually during their November meeting with no limit on the terms they may serve.

Customers and Stakeholders. As defined by Freeman (1984), stakeholders are groups that affect or are affected by the organization. The first stakeholder group is military pensioners, the organization's beneficiaries, and its members (i.e., customers). Other important stakeholders include donors and funders, board members, partners, collaborators, and Veterans Affairs Canada. The nonprofit does not have any employees. Table 4 provides an overview of the nonprofit's key stakeholders.

Table 4*Stakeholder Map*

Stakeholder	Vested Interest	Expectations	Influence	Internal/ External
Pensioners	Benefit from advocacy	Improved CAF pension	Low	External
Members	Benefit from advocacy and membership benefits	Improved CAF pension, engagement, and member benefits	Low	External
Donors and funders	Provide funds and resources	Fiscal responsibility and impact	Low	External
Board members	Sustainability, positive impact on pensioners	Effective Advocacy	High	Internal
Partners	Information and regulatory supply chain	Communication and prompt payment	Medium	External
Collaborators	Collaboration and joint advocacy	Information and resources	High	External
Veterans Affairs Canada	Partnership and support	Improved CAF pensions	High	External

Suppliers, Partners, and Collaborators. The organization does not have suppliers because AMC performs its administrative functions, and the board of directors operates virtually, with each member purchasing their supplies. Without employees or volunteers, the nonprofit's partners and collaborators are critical to delivering its mission. The association management company performs the routine administrative day-to-day activities of the organization, including correspondence, website development and hosting, social media postings, regulatory filings, and budgeting and financial management. As appropriate, AMC staff triages incoming emails and phone calls for the nonprofit and forwards relevant information to individual board members. The

association management firm also manages relationships with nonadvocacy suppliers on behalf of the organization.

The National Council of Veterans Associations (NCVA) is an MSIN of about 68 nonprofit organizations that serves the veteran community. Participation in this MSIN provides improved opportunities to get their objectives before government policymakers. For example, for those pensioners who seek marriage after 60, the current regulation prevents their dependent spouse, if the marriage occurred after the pensioner reaches 60, from accessing their pension should they outlive them. Table 5 lists the organization's suppliers, partners, and collaborators.

Table 5

Suppliers, Partners, and Collaborators

Type	Organization	Role
Suppliers	None	
Partners	Association management company	Performs administrative, finance, marketing, social media, and membership functions
Collaborators	National Council of Veteran Associations of Canada	The coalition develops an annual plan for the member organizations that it presents to government policymakers.

Organizational Situation

This subsection seeks to define the organization's strategic situation. I discuss the nonprofit's competitive environment, strategic context, and performance improvement system. Also, I address its current competitive position, material changes affecting its ability to deliver on its mission, and its approaches to continuous improvement.

Competitive Environment

For-profit companies compete with other organizations for both customers and resources. In contrast, nonprofit organizations compete for visibility by their beneficiaries, access to financial resources, dedicated volunteers, and members providing financial and nonfinancial support (Baldrige Performance Excellence Program, 2020b, pp. 6). The competitive environment section describes the nonprofit's market, changes in its operating environment, and comparative data used to measure its marketplace performance.

Competitive Position and Competitive Changes. Many nonprofit organizations are serving the needs of Canadian military service veterans, including several focused on serving the needs of retired military personnel. For example, the National Association of Federal Retirees (Federal Retirees) is a prominent force in advocacy for seniors and federal retirees, including those from the Canadian armed forces. The Federal Retirees organization has nearly 170,000 members, with 60,000 veterans (National Association of Federal Retirees, 2022a). The nonprofit staff enjoys frequent access to government policymakers through appointments to multiple government-sponsored boards and is one of three governing bodies for the Public Service Health Care Plan (National Association of Federal Retirees, 2022b). Also, the organization expanded its advocacy activities to Canadian seniors (National Association of Federal Retirees, 2022b), which overlaps with many retired CAF veterans. The Federal Retirees organization has resources, access, and listening systems to advocate for CAF pensioners effectively.

To successfully advocate for CAF pensioners, the nonprofit collaborates with other organizations focusing on military veterans to get their messages to the appropriate ministers able to influence legislation. With approximately 500 remaining members, no recent advocacy success, and minimal ability to engage with policymakers, nonprofit leadership is limited to letters, emails, personal contacts, and other mechanisms to deliver messages directly to the appropriate governmental decision-makers. Table 6 overviews the critical advocacy metrics affecting their reach and impact. Through partnerships with other military-focused nonprofits, the organization's messages are effectively delivered to the right people in government who can influence legislation and regulation.

Table 6

Competitor Comparison

	AFP/AAC	Federal Retirees
Year Founded	1970	1963
Branches	0	78
Workforce	Volunteer	Professional Staff
Total Members	500	170,000
Veterans	500	60,000
Membership Eligibility	CAF pensioners or survivors	Canadian Public Service Pensioners, RCMP or CAF, federal judges, and honorably discharged veterans
Membership Partners ¹	1	17
Volunteers	0	800
Annual Dues		
Individual	\$15.00	\$52.56
Couple	Not available	\$68.28
Committee Memberships	0	4
Committee Governance	0	1

Note: 1. The number of partners offering its members benefits.

Comparative Data. Sources of comparative data are not defined for the advocacy services provided by the nonprofit. Potential sources of comparative data include other nonprofit advocacy organizations, such as the National Association of Federal Retirees, that advocate with the government on behalf of federal government retirees, including those from the Canadian armed forces. The nonprofit does not report many results or compare them with other organizations.

Strategic Context

Organizational leaders must understand their strategic advantages and strategic challenges. The Baldrige Performance Excellence Program (2022) stated that strategic advantages and challenges are sources of competitive advantage. Competitive advantage is the superiority one organization has over its peers in the marketplace through its activities or decisions (Memon et al., 2021), and to gain competitive advantage, an organization needs valuable, inimitable, non-substitutable, and rare and intangible resources (Liu, 2020). The board of directors identified their three strategic advantages and four strategic challenges (Table 7).

Table 7

Strategic Advantages and Challenges

Type	Description
Strategic Advantages	<ol style="list-style-type: none"> 1. A deep knowledge of the needs of veterans and CAF retirees. 2. Partnerships with other veteran-focused organizations. 3. Significant financial resources.
Strategic Challenges	<ol style="list-style-type: none"> 1. A lack of dues-paying members. 2. An aging board of directors. 3. An outdated mission. 4. An inability to influence legislation directly.

Partnerships are critical for the nonprofit to effectively advocate for its beneficiaries, and according to Jenkins and Georges (2019), partnerships were critical to AARP's strategy.

Performance Improvement System

Holistic business excellence frameworks enable leaders to focus on the specific factors that drive performance (Sulistyo et al., 2021), and high-performing organizations improve their performance, respond to the market, deliver better results than challengers, and stay competitive over a prolonged timeframe (Do & Mai, 2020). It is vital to understand dues-paying members' needs and develop a compelling organizational vision and membership value proposition. The nonprofit does not use formal or informal approaches to improve its advocacy and business processes.

Leadership Triad: Leadership, Strategy, and Customers

The leadership triad consists of the first three categories of the BEF: leadership, strategy, and customer. Nonprofit leaders are responsible for implementing an organizational strategy by clearly understanding their stakeholders' needs, expectations, and requirements. The nonprofit's most significant areas for improvement address gaps found in the leadership triad distributed equally across the leadership, strategy, and customer categories. These three areas support understanding customer requirements, translating those into compelling market offers, and developing and executing a cohesive strategy for delivering its advocacy and other services. The core of leadership is strategy-defining the unique position, assessing trade-offs, and stitching activities together that create barriers to entry (Porter, 1996). Successful leaders are adept and agile at meeting customer and other stakeholder needs, leading to a more sustainable organization. The

organization's leaders primarily rely upon ad hoc approaches when addressing many of the processes in these categories.

Leadership

The leadership section of the BEF describes the senior leaders' actions to sustain the organization. This section includes the actions to fulfill legal, ethical, and societal responsibilities to ensure sustainable governance. Nonprofit leadership includes the board of directors and the executive director (Wang, 2021). Also, leadership focuses on establishing the correct environment today and planning for tomorrow.

Senior Leadership

Three of the seven nonprofit board members are more actively engaged in the organization's activities. One board member serves as the volunteer executive director, managing day-to-day relationships with AMC, the association management partner that serves as the organization's administrative workforce. A second board member leads the all-volunteer board, and a third member manages the finances. The board of directors is responsible for governance activities, including financial oversight, delivery of advocacy services, and stakeholder management.

Establishing Mission, Vision, and Values. The nonprofit continues to follow the original mission and vision created in the early 1970s by the nonprofit's board of directors. The founders did not include values, nor has any subsequent board created them as part of their strategic direction. Since the founders defined the original mission and vision, successive boards of directors have not made any material changes, nor is there a process for determining whether an update is necessary based on changes to their

environment. Leaders systematically deploy the mission and vision to its members and stakeholders through the organizations externally facing website and the last page of their tri-annual member newsletter. The nonprofit does not use systematic approaches for creating its mission, vision, and values.

Promoting Legal and Ethical Behavior. The board members' actions and reputation demonstrate their commitment to legal and ethical behavior. Because the organization does not have employees, their interactions with other board members, other nonprofit organizations, the federal government, and other stakeholders continue to reflect their commitment to legal and ethical behavior. Irregardless of systematic processes, none of the board members interviewed recall any ethical breaches. However, board members do not formally attest to their conduct or receive formal or informal training to perform as a board member. The organization does not use systematic approaches for ensuring the board members' commitment to legal and ethical behavior.

Stakeholder Communication. The nonprofit has many methods available to communicate with its stakeholders (Table 8). However, other than emails, texts, phone calls, and in-person meetings, the other methods are infrequently or not used to communicate with stakeholders. For example, the last tweets and posts to the nonprofit's Twitter account and Facebook page are over a year old. Their website is static, members do not attend the annual general meeting (AGM), and the last newsletter is from Spring 2022. The newsletter, website, and Facebook page provide instructions for how members and others can contact the organization. The organization's Twitter account is also a method members and stakeholders can use to contact the organization. Before the annual

general meeting, the organization posts a notice in the newsletter and the website inviting them to attend via Zoom. Although the organization has multiple communication methods defined, systematic approaches for engaging key partners, collaborators, stakeholders, and beneficiaries are missing.

Table 8

Leadership Communication Methods

Communication Method	Intended Frequency	Status	Audience	Direction of Communication
Email, text, phone calls	Ongoing	Active	Stakeholders	2-way
In-person meetings	Ongoing	Active	Stakeholders	2-way
AGM	Annual	No participation	Members	2-way
Newsletter	3 issues per year	Outdated	Members	1-way
Website	Ongoing	Static page	Stakeholders	1-way
Facebook	Ongoing	Inactive	Stakeholders	2-way
Twitter	Ongoing	Inactive	Stakeholders	2-way

Creating an Environment for Success. The board of directors meets annually in conjunction with its AGM that is open to all members. Historically, no members have attended. Board members also engage in ad hoc telephone, text, chat, and email communications to address the organization’s work between AGMs. The board focuses on serving the needs of pensioners as defined by the original mission and vision—a look backward—and does not look to the future. Informally, the organizational leaders work to ensure the nonprofit’s sustainability by actively recruiting new board members with the necessary skills to support their mission. The leaders do not use systematic approaches to creating an environment for success, either now or in the future.

Creating a Focus on Action. Policy advocacy is a marathon rather than a sprint.

Cameron and Kwiecien (2019) state that advocacy efforts to change government policies can take decades. They also noted that in 2019, the government changed the Canadian policy advocacy regulations, and nonprofits without charity status could pursue their advocacy activities without complying with federal regulations applicable to registered charities. Board members are responsible for advocacy activities primarily consisting of a long-term collaboration with a multistakeholder issue network of 68 veteran-focused organizations. The board member with the most experience in the topic works independently to provide the MSIN with the requested information. Zhang and Guo (2020) found that multiple configurations of organizational environment, organizational attributes, strategies, and tactics result in effective advocacy. The board members do not use systematic processes to initiate insider and outsider advocacy tactics (Table 9) that would be evidence of establishing a focus on action to achieve the nonprofit's mission.

Table 9

Insider and Outsider Advocacy Tactics

Type	Tactic
Insider (direct with policymakers)	Direct lobbying
	Judicial advocacy
	Administrative lobbying
	Expert testimony
Outsider (with others)	Research
	Coalition building
	Electioneering
	Media advocacy
	Social media advocacy
	Grassroots lobbying
	Public events and direct action
	Public education

Governance and Societal Responsibilities

The processes in this category define the organization's approaches to effective governance, improvement of leaders, and compliance with legal and regulatory requirements. Standard for-profit governance practices (e.g., transparency, oversight, board independence) apply to nonprofits and improve their ability to allocate funding to support their mission (Blevins et al., 2022). Also discussed are leadership processes for supporting society and its key communities.

Governance System. One area with an informal approach is adding a new board member with skills vital to the organization's mission attainment. The organization does not document the steps; however, only two board members have brought others onto the board. The informal process used is: (a) a board member identifies a skills gap with the current board of directors, (b) the board member identifies the board candidate, (c) the board member ensures the candidate is open to board service with the nonprofit, (d) at the AGM, the sponsor provides a brief overview of the board candidate (who is in attendance), (e) other board members can ask the candidate questions to help them understand their qualifications, and (f) then the board members vote on the admitting them to the board of directors. One governance shortfall is related to the annual tax filing that AMC completes on behalf of the nonprofit and files with the government. The board of directors is not involved with its preparation, review, or approval. Systematic approaches for some governance functions are missing.

Performance Evaluation. Without a systematic approach to assessing board members and overall performance, the board members rely upon their informal

relationships with each other to assess performance. As board members identify concerns, they address them using standard management practices found in most organizations. However, there are no systematic processes to evaluate the board's performance, the executive director, who is also a board member, or themselves.

Legal and Regulatory Compliance. Revenue Canada classifies the client organization as a noncharitable nonprofit. To maintain this status, noncharitable nonprofit organizations must operate exclusively for social welfare, civic improvement, pleasure, recreation, or any other purpose except profit (Charities Directorate, 2016). The charities directorate also stated that noncharitable nonprofits must file annual tax returns and cannot issue income tax receipts to donors. The nonprofit complies with these regulatory requirements. The nonprofit does not use systematic approaches to address legal, regulatory, and community concerns with its advocacy services and operations. Further, there are no systematic approaches for anticipating future legal, regulatory, or community concerns with its operations.

Ethical Behavior. Lincoln et al. (2019) observed that behaving transparently and ethically with internal and external stakeholders supported boards in fulfilling their responsibilities. Board members promote and ensure ethical behavior through their interactions with internal and external stakeholders, achieving transparency in communication, and delivering on their promises. Evidence of ethical operations is noted by the absence of any issues reported to the nonprofit and board members are recruited to serve on other nonprofit boards. The organization's informal board member recruiting

strategy selects individuals with high ethical standards, minimizing the need for formal or systematic approaches for promoting ethical behavior.

Societal Well-Being. The nonprofit's mission is to advocate for improved pension benefits for retired CAF veterans and their survivors. Ensuring that the Canadian government provides pensioners with the benefits they earned helps them maintain their standard of living and contribute to the communities in which they live. However, the organization does not use systematic approaches for incorporating societal well-being and benefits into its strategy and daily operations processes.

Community Support. The nonprofit's key communities are CAF pensioners, its members, and local jurisdictions associated with AMC's office location. The organization advocates for its pensioners to ensure they receive their entitled governmental benefits and seeks to provide members with additional benefits supporting their wellbeing. They also support the local economy through their contract with AMC, helping to support employment for the agency's staff. Nevertheless, the organization does not have systematic approaches for supporting its key communities.

Strategy

This section of the BEF describes the organization's approaches to developing and executing its strategic objectives and action plans, modifying them as necessary, and measuring progress. Strategy fundamentally seeks to answer the question of what factors contribute to sustainable competitive advantage and how managers establish and oversee organizational performance (Feldman, 2020). Islami et al. (2020) observed that strategy evaluates the current environment and makes necessary changes. The researchers also

stated that mature organizations not paying attention to their strategic environment are subject to the liability of obsolescence and can fail. The four board members interviewed stated that the nonprofit does not conduct strategic planning. Therefore, they do not use systematic approaches for developing and deploying their strategy and action plans.

Strategy Development

The organization has an express purpose defined by its mission and vision to protect and advocate for the rights of retired military pensioners and their survivors. This original purpose continues to drive the singular organizational strategy. Fuertes et al. (2020) noted that leaders select strategies used to meet the needs of their customers. The researchers also noted that organizational success depended on how skillful leaders performed this vital function and their continuous adaptation to the environment. Organizational leaders observed that the Canadian government improved CAF pensions, mostly removing the need for dedicated advocacy. However, the nonprofit does not employ systematic approaches to develop its strategy.

Strategic Planning Process. Tenney and Sheikh (2020) noted that strategic planning is critical for small- and medium-sized nonprofit organizations to help ensure their survivability. The nonprofit's mission of promoting and protecting the rights of CAF pensioners and their survivors was clear and the board was passionate about their cause, there was never a consideration to revisit the mission or update its approach to executing its services. The number of issues addressed by the organization in the last 50 years is minimal, and the nonprofit responded to these events as needed, usually requiring lengthy advocacy efforts in partnership with other nonprofits. The nonprofit has not

affected a change in CAF pensions in the last 20 years. For example, the Pensioners' Dental Services Plan was enacted in 2001, removing a significant shortfall in CAF pensions and creating an opportunity to review their strategy with significant environmental change. Because the improvements in CAF pensions since the early 2000s minimized the need for advocacy, the organization is considering a systematic approach for strategic planning.

Innovation. The Baldrige Performance Excellence Program (2020b, pp. 48–49) defines innovation as meaningful discontinuous or breakthrough results—a change that creates new value for stakeholders. Further, Dionisio and De Vargas (2022) remarked that innovation improves current practices and creates significant and practical changes. The nonprofit can accomplish meaningful changes through improved processes, new products or services, a revised business model, or directly improving the pensioners' well-being. In 2019, the treasurer advanced, and the board approved, a motion to improve the organization's financial returns by investing their funds in the stock market rather than an interest-bearing guaranteed investment contract. This board motion process is an example of an informal, though systematic, process the client's board of directors uses to advance changes to their operations. However, without achieving breakthrough results, their process is more aligned with continuous improvement than innovation. With no change to the nonprofit's mission, the board of directors has not considered the need to develop systematic approaches for exploring new strategic opportunities or assessing ones to pursue.

Strategy Considerations. Individual board members identify information relevant to military pensioners or survivors through their networks and research. The information collected is ad hoc and not formally shared with others or captured in a knowledge management system for use in strategic or other planning activities. Effective strategic planning requires the organization to understand its internal capabilities and competitive environment and use that information to develop an executable plan that leverages its core competencies in the marketplace. When conducting organizational strategy, leaders can use analytical tools such as Porter's five forces (Porter, 2008) and value chain analysis (Prasetyo & Dzaki, 2020). Other techniques include SWOT (strengths, weaknesses, opportunities, threats) and PESTLE (political, economic, social, technological, legal, and environmental; Christodoulou & Cullinane, 2019). Ensuring systematic processes for compiling comprehensive internal and external views of the nonprofit's operating environment provides the baseline information needed to develop a comprehensive strategy. The organization does not employ systematic processes for collecting and analyzing relevant data and developing information for its strategic planning activities.

Work Systems and Core Competencies. The organization has an informal process for determining the work performed by board members and a contractual agreement (renewed annually) for work performed by AMC. Two board members with specific expertise in CAF pensions perform most activities related to the organization's mission (i.e., advocacy). The association management company is responsible for day-to-day activities such as government and regulatory filings, archiving financial records,

receiving and triaging emails and phone calls, publishing the newsletter, including the writing of articles on subjects identified by the treasurer, social media marketing, and maintaining the nonprofit's website. Nonprofit leadership determined the division of labor by optimizing the core competencies of the board members' understanding of retired military and AMC in nonprofit operations. The simple division of labor aligns activities related to advocacy and governance to the board members and operational and administrative activities to the association management firm. Although lacking a systematic approach, this informal process continues to be effective, given the nonprofit board of directors' size and ongoing advocacy efforts.

Strategic Objectives

Strategic objectives are derived from an organization's strategic plan and provide guideposts for achieving the organization's mission. These plans are usually short-term and often align with the organization's fiscal year. Organizations have limited, and often competing resources, that require organizational leaders to balance resource needs to achieve their objectives. Leaders do not use systematic processes to develop, evaluate, or balance the organization's strategic objectives.

Key Strategic Objectives. Leadership has not documented or formalized strategic objectives or processes for developing and revising them. However, the board members informally aligned to increasing membership and maintaining current revenue as critical objectives. Several board members also discussed a third strategic objective of measuring the impact of their advocacy efforts, which remains an open conversation. The Baldrige Performance Excellence Program (2020a, pp. A-7) describes that strategic

objectives might address topics such as service enhancements, marketing strategies, membership strategies, joint ventures, and financial growth in addition to other activities vital to organizational success. Leaders have identified strategic objectives aligned with their current mission.

Strategic Objective Considerations. The nonprofit's informal strategic objectives focus on reversing the membership-related strategic challenge. Adding new and retaining current members increases the number of pensioners, which can supplement revenue and help mitigate the strategic challenge of a limited understanding of pensioners' concerns. Heylen et al. (2020) observed that nonprofit leaders connected to their membership base could better develop policy views that align with members or broader society. The researchers also observed that members are critical to a nonprofit's effectiveness. There are no systematic processes for balancing the strategic objectives across potentially competing organizational needs.

Strategy Implementation

Developing a market-competitive strategy gives the nonprofit the necessary focus for favorably impacting its beneficiaries. However, without the ability to implement the strategy, change is not possible. Tawse and Tabesh (2021) found that strategy implementation was a complex and iterative process consisting of activities performed by managers and employees to achieve strategic objectives. Each board member acts independently, delivering advocacy and governance efforts that match their skills and knowledge. The board members develop informal plans to respond to requests for help or gain support from members of parliament and other government officials. Examples of

this are its work supporting NCVA's advocacy efforts to remove the stipulations for marriage after 60, developing videos showcasing veterans' concerns, helping medical pensioners navigate government processes to receive their benefits, and meeting with members of parliament to sponsor private bills. Whereas removing the marriage after 60 clause is related to the nonprofit's mission, the others are outside the mission and focused on helping medical pensioners and supporting CAF veterans—still all within the veteran market segment. These short-term actions derive from a board member's knowledge rather than the nonprofit's strategy, strategic objectives, or long-term focus on serving its beneficiaries. The organization does not systematically develop, deploy, or modify action plans.

Action Plan Development and Deployment. Action plans describe the tangible steps to implement the organization's strategic objectives. This category includes allocating resources to the plans, deploying the plans to the workforce, ensuring sufficient financial and workforce resources to execute the plans, and developing associated performance measures. Also, action plans include partners and collaborators necessary to execute the activities to accomplish their mission. The organization does not develop action plans or use systematic approaches for developing, deploying, or modifying them.

Action Plans. These plans document the resources and time horizons required to achieve their strategic objectives (Baldrige Performance Excellence Program, 2020b, pp. 46). Action plans derive from the organization's strategy and consider resources, strategic objectives, and strengths and weaknesses. When a board member takes on a project, they create and self-manage their efforts to meet the agreed timeline necessary to advance

their advocacy activities. As noted earlier, the organization does not have systematic approaches to developing action plans supporting accomplishing its mission.

Action Plan Implementation. Boards implement action plans to support their strategy and strategic objectives, ultimately delivering the nonprofit's advocacy efforts. Fuertes et al. (2020) remarked that strategy includes defining long-term objectives, creating action plans, and allocating resources to accomplish them. Leaders can align the nonprofit's resources (e.g., board members, collaborators, partners) to action plans. The missing critical stakeholders are members that can directly support the nonprofit's mission through their knowledge of the subject or direct advocacy with policymakers. For example, collaborating with NCVA is critical to the nonprofit's ability to further its marriage after 60 advocacy efforts. This partnership enables the nonprofit to get their requests heard by policymakers, an avenue not available to them on their own. The organization does not use action plans in the execution of its strategy, nor do they have a systematic approach to developing them.

Resource Allocation. The volunteer board members expect to perform the organization's governance and advocacy work, and their availability and expertise govern the type and number of initiatives addressed. Only one board member has been actively supporting the marriage after 60 initiative for the last 20 years, highlighting the reduced need for CAF pension advocacy. Board members accept new tasks based on their skills related to the topic and availability to perform the work within the time requested. For example, one board member is the organization's expert on marriage after 60 and he partners with the NCVA to advocate for removing the clause. The board member

supporting this effort leverages his deep knowledge of the topic to prepare research papers requested by NCVA leadership and used with government policymakers. Board members self-assign themselves to advocacy activities based on their skills, availability, and interests. The association management company performs the nonprofit's administrative activities, including tracking the budget, managing the website and social media presence, producing the newsletter, answering phones and emails, taking appropriate action (e.g., removing a deceased member from the mailing list), and forwarding other inquiries to a board member, as necessary. The organization does not create action plans or use a systematic approach for allocating resources to them.

Workforce Plans. The nonprofit's visible workforce comprises board members and AMC association management employees. The Baldrige Performance Excellence Program (2021b, pp. 53) states that the workforce includes everyone involved in accomplishing the organization's work. Extending this definition from board members and AMC, it includes the collaborators and volunteers (i.e., members) involved in its advocacy activities. The organization does not have a workforce plan nor a systematic process to develop one.

Performance Measures. Organizational leaders can understand the progress towards their objectives by periodically reviewing their action plan performance (Baldrige Performance Excellence Program, 2020a, pp. A-8). However, without a strategic plan and documented action plans developed to meet objectives, no performance measures are available for assessing the organization's progress toward accomplishing its advocacy objectives. Dillard (2020) found that nonprofit leaders should develop a

performance measurement system with key performance indicators representative of the organization's mission. The nonprofit's board members can elect specific areas to define performance measures, focusing on a small set of critical activities necessary for success.

Performance Projections. Forecasting expected results from advocacy activities takes significant effort. Performance projections indicate expected performance and goals indicate desired performance (Baldrige Performance Excellence Program, 2020a, pp. 50). With improvements in CAF pensions, there are limited significant gaps that require intervention. During the nonprofit's existence, the organization mobilized efforts to support changes to government policies or regulations five times, with only marriage after 60 currently active. The last significant effort was in the 1990s, leading to a change in the CAF dental plan benefits.

There remains a need for advocacy, as noted by the ongoing work on marriage after 60, however, undesirable events affecting CAF pensions can occur when the government changes, ministers implement policies seen as detrimental to the organization, or unfavorable macroeconomic factors affect the country. Affecting change in public policy requires a long-term focus. Sabatier (1988) said that understanding the potential impacts of policy change requires at least a decade of learning through the cumulative effects of research findings and common knowledge. Given the extended timeframes for successful advocacy and the limited number of issues to address, the organization has yet to develop short- and long-term performance projections.

Action Plan Modification

Once the organization's leaders develop systematic processes to create and implement action plans supporting its strategy, they are subject to modification. Action plans are established based on the organization's current internal and external environment and are subject to disruption, as the performance metrics could reflect insufficient progress. Also, changing economic conditions, new governmental or legislative priorities, new or evolving customer requirements, or changes in internal resources may necessitate a shift in action plans. With each new administration, there is the possibility of changes to the priorities of Veterans Affairs Canada, the primary stakeholder responsible for enacting legislation affecting military pensioners. The current high inflation rate is an example of a macroeconomic event that could trigger benefit changes and require the organization to modify its objectives, calling for updated or new action plans. The organization does not have systematic approaches for modifying action plans.

Customers and Stakeholders

Activities in this category seek to listen to and identify the specific needs of beneficiaries and critical stakeholder groups necessary for creating compelling products and services. The nonprofit's customers are its members that are representative of CAF retirees—beneficiaries of its advocacy activities. Keremidchiev (2021) remarked that organizational sustainability requires establishing mutually beneficial relationships with stakeholder groups. However, the nonprofit does not employ systematic approaches for

listening to current or future customers and stakeholders, creating market segments, or developing compelling offers.

Customer Expectations

Understanding the needs of beneficiaries and stakeholders is essential to organizational success. Rosnerova and Hraskova (2021) noted that marketing aims to understand its customers thoroughly by analyzing their needs and desires. Clearly understanding member needs and stakeholder requirements is the first step in determining unique value propositions, defined by Rintamäki and Saarijärvi (2021) as capturing the organization's reason for being and explicitly describing its operational objectives. Further, an organization's portfolio of value propositions is one of its most valuable resources to a diverse mix of stakeholders (Bailetti et al., 2020). Persuasive value propositions help ensure that members, beneficiaries, and potential customers receive value from the nonprofit's services and that stakeholders support the organization's mission.

Stakeholders. Nonprofit leaders operate in a complex environment and must understand the most relevant stakeholders of the organization. Wang (2021) observed that a nonprofit's stakeholders are internal (e.g., employees, board members, volunteers) and external (e.g., beneficiaries, government officials, media, and donors). Managing these relationships is the domain of the board of directors, responsible for assessing each stakeholder group's power and organizational stake (Freeman & Reed, 1983). The nonprofit's current customers are its members. Other stakeholders include beneficiaries, the government, collaborators, and nonprofit partners. Another stakeholder important to

the nonprofit is NCVA, a multistakeholder issue network serving as an umbrella advocacy organization for 68 military-related nonprofits. The nonprofit partners with NCVA to advance their agenda with government policymakers, increasing their salience and opportunity to advocate their position better. The nonprofit does not employ systematic approaches for listening to its internal or external stakeholders.

Current Customers. The nonprofit needs more effective approaches for listening to current members. To meet nonprofit membership requirements, the veteran or their survivor must be eligible to receive a Canadian armed forces pension for life. The board members' primary method of gathering customer information is through their personal CAF pensioner network. Leaders have attempted to obtain feedback systematically directly from their members at the AGM; however, no one participated in recent memory, removing a crucial two-way listening mechanism. The organization has not engaged with its members for several years, and with a membership of nearly 600, this method does not provide a significant source of actionable information. The nonprofit has minimal effective mechanisms to listen to its current members, and ad hoc interactions with CAF pensioners indicate that most are content with the benefits provided by the Canadian government. The nonprofit does not offer pensioners a compelling reason to support its mission, and the organization does not have systematic approaches for listening to its current members.

Potential Customers. Expanding the nonprofit's focus beyond CAF pensioners could include veterans discharged with those participating in mental health programs (e.g., post-traumatic stress disorder), a medical pension, or those entering the civilian

workforce without a pension (i.e., return of contributions). A potential method of listening to its beneficiaries and potential beneficiaries is through the board members' services on other nonprofit boards of directors—a board interlock. Bloch et al. (2020) stated that board interlocks form a social network between board members that facilitates the mutual sharing of knowledge, practices, and policies. The organizers noted that nonprofit organizations linked together through shared board members are better governed, operate more efficiently, and report significantly more direct donations. Several nonprofit board members also serve on other nonprofit boards with the common theme of serving CAF veterans, whether they are pension eligible or elect for a return of contributions. Through these informal board interactions, there is an opportunity to listen to pensioners and potential CAF beneficiaries. The organization has not formally identified potential customers or developed systematic listening mechanisms to hear from them.

Customer Segmentation. The nonprofit's advocacy market segment is veterans eligible for a CAF pension or their survivors and its customers are the nonprofit's members, also CAF pensioners or their survivors. The board of directors has kept this original customer segment since the 'nonprofit's inception. However, actions taken by individual board members outside the nonprofit's mission expanded this market segment to include veterans leaving the service with return of contributions and those with medical pensions—keeping the focus on veterans. Dolnicar et al. (2018) observed that organizational leaders use market segmentation to select a target market for a given product. They also noted that market segmentation is critical to successful marketing

strategies. The organization does not have systematic approaches for determining its market and customer segments.

Product Offerings. The nonprofit provides one service for its members and CAF pensioners—advocating for their rights with Veterans Affairs Canada. This advocacy activity is without formal structure and one long-term board member has supported the work since the 1990s. The organization learns of potential changes to CAF retiree benefits through its board members’ networks, partnership with NCVA, and board interlocks. They also rely upon their experience to understand possible ramifications due to economic or political environmental changes. For example, the marriage after 60 act removes the survivor benefit for retirees who marry after their 60th birthday unless they accept reduced benefits immediately. The organization continues collaborating with other veteran organizations to update this regulation, one of 10 initiatives included in NCVA’s 2023 legislative agenda. A second product available to members is a newsletter and discounted auto and home insurance.

Informally, board members provide services to veterans outside the nonprofit’s mission and within their individual capabilities. These ad hoc efforts, although not part of the board process, provide the organization with avenues to explore potential new product offerings. If applied rigorously to selecting markets and customers, board members’ initiatives to explore other services is a step in understanding potential customer needs. The nonprofit does not use systematic processes for determining its current or future product offerings.

Customer Engagement

Organizational leaders establish an environment that enables connecting with customers, a critical activity for long-term sustainability. This category discusses systematic approaches to building and sustaining profitable customer relationships, supporting customers, enabling them to obtain information, managing complaints, and using the voice of the customer data (Baldrige Performance Excellence Program, 2021b). The nonprofit has minimal systematic processes for engaging customers.

Relationship Management. The organization's advocacy customers are its members. The newsletter and website are the primary methods for building relationships with them and enhancing their brand. Other social media sites include Facebook, Twitter, and Instagram, with limited connections with members and others. Until 2012, the nonprofit distributed a flyer in the annual mailer sent to all retirees by VAC. When the government consolidated the administration of its multiple pension services into one group, the ability to add a flyer to their standard mailings was eliminated, severely limiting the nonprofit's ability to reach CAF pensioners and enroll new members. Dues-paying members' benefits include a periodic newsletter, auto and home insurance discounts through TD Insurance group, and keeping informed of current initiatives, petitions, and programming of concern to CAF pensioners. Beyond the periodic membership newsletter and static website, and inactive Facebook and Twitter accounts, the organization does not use systematic processes to build and manage customer relationships. There are also no mechanisms in place to identify and implement new member benefits.

Customer Access and Support. The organization includes its phone, email, and postal mail contact information on its website, newsletter, and Facebook page. Twitter provides its own mechanism for reaching the nonprofit. Customers can review the website to understand the organization's mission, history, and board members' information and, if they are a member, through the newsletter. When someone utilizes these methods to contact the nonprofit, AMC triages the communication and responds to the inquiry directly or forwards it to the appropriate board member for action. The volume of inquiries is light, with AMC reporting that they receive 3–4 in a typical year. These systematic approaches employed by AMC provide members with avenues for seeking information and support.

Complaint Management. The association management company also receives customer complaints, usually administratively related to the organization's mailing list or membership roster. In these cases, AMC takes action to update its list appropriately. There have been no customer complaints regarding the organization's mission or purpose for at least 10 years. Through its partnership with AMC, the nonprofit provides customers with a systematic approach to resolving complaints.

Fair Treatment. The organization only has one market segment—veterans entitled to a CAF pension. Within the market segment, the customer group is the nonprofit's members or their survivors. The organization does not differentiate between the two customer groups in its marketing or support processes and treats everyone equally. They do not have systematic approaches for differentiating between or ensuring fair treatment of their two customer segments.

Satisfaction, Dissatisfaction, and Engagement. The nonprofit has no record of members expressing satisfaction or dissatisfaction with their advocacy activities.

Engagement is measured by membership renewals and those attending the annual meeting. Membership continues to decrease, and no member has attended the annual meeting in recent memory, implying that engagement is nonexistent. The nonprofit does not use systematic approaches to measure customer satisfaction, dissatisfaction, or engagement.

Satisfaction Relative to Other Organizations. Members benefit from changes to their CAF pensions regardless of the source of the change—there is only one product, administered by the Canadian government. Retirees have options for where they invest their membership dollars and comparing the nonprofits membership roster with other pension-focused advocacy organizations can indicate satisfaction. The Federal Retirees Association also advocates for CAF pensioners, serving the same market and customer segments, and has 60,000 members in their military section. The membership difference between the nonprofit's 600 members and Federal Retirees' 60,000 is significant—driving the conclusion that their organization has better brand recognition and provides a more compelling value proposition—even with the annual membership fee differential (i.e., \$15 vs \$53). The nonprofit does not use systematic approaches to determine member satisfaction relative to other organizations.

Voice-of-the-Customer and Market Data

The organization does not collect voice-of-the-customer data from its members. As a proxy, board members informally collect data from their peer CAF pensioner and

veteran network. However, the leaders do not store, share, or use the data gathered from these limited interactions to improve organizational sustainability. The organization does not use systematic approaches for gathering voice-of-the-customer data.

Results Triad: Workforce, Operations, and Results

The results triad include descriptions of workforce processes, operational processes, and organizational performance results. Leaders investing in these processes engage their workforce, design and deliver their products and services, and measure results to improve organizational outcomes. The results category includes indicators for leadership and governance, customer, workforce, and financial and market performance outcomes.

Workforce

This category discusses the processes used to enable a high-performance environment, engage the workforce in accomplishing the nonprofit's mission, and provide the foundation to adapt to environmental changes. Further, the workforce category addresses capability and capacity needs and how leaders develop the workforce in alignment with the organization's business requirements. In 2007, de Waal noted that high-performing organizations recognized employees as their primary asset. The seven-member board of directors manages the organization's work. They are the workforce responsible for governance, leadership, and delivery of advocacy services and managing relationships with members, partners, collaborators, and AMC. The nonprofit has minimal systematic processes for managing its workforce.

Workforce Environment

Ensuring sufficient and knowledgeable staff to perform the organization's work is critical to long-term organizational sustainability. The workforce environment category discusses the nonprofit's approaches to assessing workforce capability and capacity requirements, hiring and onboarding new workforce members, preparing the workforce for changes, and workforce management. This category also discusses the workplace climate management processes (i.e., environment, benefits, and policies).

Capability and Capacity. The nonprofit board of directors informally monitors the organization's work and assesses whether there is sufficient capability to perform governance, leadership, and advocacy activities. Leadership's primary workforce focus is its capabilities, as the capacity for delivering its governance and advocacy mission has been appropriately staffed for the last 30 years. When a board member identifies a capability gap, they identify a potential candidate, assess their skills, and alignment with the organization's mission. The selected candidate is invited to the AGM for discussion and approval by the board of directors, thus ensuring the organization continues to have the necessary governance, leadership, and advocacy skills. For example, a few years ago, the board chairman unexpectedly left the organization, leaving a leadership gap. One board member began the process to identify a potential candidate passionate about supporting CAF pension advocacy and willing to lead the organization forward. At its AGM, the board discussed the candidate, and the new member was approved to join the board as its chairman. This informal approach is reasonable for this small nonprofit

organization as it only has one advocacy service, the board members are the workforce, and it only delivers services within this narrow market segment of CAF pensions.

New Workforce Members. The organization recruits and onboards new board members informally. Once the board of directors approves the new board member at their AGM, they receive an orientation from another board member and begin participating in the organization's work. Last year, the board chairman determined a need to strengthen the organization's advocacy capabilities by adding a professional marketer with strong social media skills. Mato-Santiso et al. (2021) found that nonprofits use social media to support their advocacy efforts because the internet provides greater reach, online is less costly than traditional media, and it generates greater engagement with stakeholders. Supporting this need, the board nominated and approved a new board member with deep expertise in social media. The organization's recruiting and onboarding processes are informal, systematic, and aligned with the needs of a small board delivering its advocacy services.

Workforce Change. The board of directors is aware that a change in their mission is needed because the shortfalls with CAF pensions have been mostly remediated by VAC, providing retirees with a fair pension for their service. Further, only one board member actively supports the MSIN's efforts to eliminate the survivor penalty when a CAF pensioner marries after 60. This is the only advocacy activity pursued by the organization since the early 2000s. To prepare the board for change, the board president commissioned a Walden University scholar–consultant study to provide the board with an independent view of the organization's strengths, opportunities for improvement, and

membership acquisition and retention strategies. Upon the scholar–consultants’ delivery of the recommendations, the board chairman will convene a strategy session to address the changing market and determine necessary steps to add new products and services to its existing pension advocacy service or pursue opportunities in other market segments or customer groups. Other than informal approaches for managing workforce change and growth, there are no systematic processes.

Work Accomplishment. The board of directors distributed the organization’s responsibilities based on the board’s and AMC’s core competencies. Board members serve as the governance, leadership, and advocacy workforce, while AMC, through their outsourcing agreement, is chartered to deliver the organization’s administrative, financial, and marketing activities. Board members self-select to address a specific advocacy issue based on their knowledge. For example, a board member with expertise in the marriage after 60 issue partners with NVCA to update the regulation. The nonprofit strategically aligns its efforts with NVCA to increase its reach and deliver greater impact. Advocacy coalition MSINs form when wicked problems are too complex to be solved by any public or private entity (Sun et al., 2022) and are a coalition of organizations, media, and consumers formed around an issue rather than an organization (Kwestel & Doerfel, 2023). The most knowledgeable board member aligns their efforts with the MSIN to better support the advocacy activities needed to protect CAF pensions. The organization does not use systematic approaches to accomplish its work.

Workplace Environment. The nonprofit operates virtually; board members supply their own office supplies, computers, and phones and perform their duties from

their homes. Extensive use of digital collaboration and communication tools (e.g., email, text, phones, Zoom) enables the board to connect easily to conduct the nonprofit's business. Given the organization's virtual nature, systematic processes are neither used nor necessary to ensure the workplace health, security, and accessibility of their home environments.

Workforce Benefits and Policies. Board members do not receive benefits from the organization for their service. They are also not reimbursed for expenses incurred on behalf of the organization, instead seeing these as another method for supporting the mission. The organization does not use, nor is it critical to develop, systematic approaches for supporting its board members via services, benefits, and policies.

Workforce Engagement

Engaged employees have a positive attitude toward the organization and its values and work with others to improve performance (Jenkins & Delbridge, 2013). This category describes leadership approaches to understanding workforce engagement drivers, engagement assessment, and organizational culture. Also included is a discussion of the processes for managing workforce performance and career development. The nonprofit does not systematically address any of these areas.

Drivers and Assessment of Engagement. The organization's founding principle is supporting the advocacy needs of CAF pensioners and survivors. Board members joined the organization because they believed in the mission to support the needs of retired Canadian military veterans. Their undocumented engagement drivers include supporting the mission, an interest in volunteerism, and, more recently, the opportunity to

participate in reinventing the organization. In the notes for Category 5.2a(2), the BEF states that engagement proxies are retention, grievances, absenteeism, productivity, and safety (Baldrige Performance Excellence Program, 2020b, pp. 20). Board members serve with the organization for years and decades delivering their governance and advocacy services—an indicator of good engagement. They do not systematically assess their engagement drivers or formally measure their engagement, nor would systematic approaches significantly benefit the governing board.

Organizational Culture. The board members share a military background through service or as a military dependent. The shared background is the common denominator supporting the organizational culture of service. The board members maintain open lines of communication, and their roles and responsibilities are defined when they join the board. The informal board selection process, longevity and family connections between board members, and open communication drive a consistent veteran-focused culture. The organization uses its informal approaches for fostering an organizational culture characterized by open communication, high performance, and an engaged workforce.

Performance Management and Development. Learning, performance management, and career development for the organization's workforce are nonexistent, given that the workforce is the all-volunteer board of directors. Board officers have specific responsibilities, and the other directors bring domain-specific legal, marketing, or finance skills. Learning is self-directed based on individual board member interests, their role on the board, and general needs to support the organization's governance and

advocacy mission. Leaders informally address succession planning for their board member roles. For example, the organization noted a need for additional financial expertise to support the organization should the current treasurer be unable to continue his duties. This proactive appointment of a chartered accountant to the board resulted from a learning when the previous board chairman was unexpectedly unable to continue performing his responsibilities. I chairmanship role was vacant for about 2 years until an appropriate person was approved by the full board. During the doctoral project, the board of directors completed a board member inventory and noted that they could diversify the board by bringing more voices, such as a female pensioner, to the table. The nonprofit leaders do not use systematic approaches for performance management and development or promoting equity and inclusion.

Operations

Nonprofit, for-profit, and not-for-profit organizations must develop products and services, define their processes, manage their supply chain, and continue innovating in a rapidly changing environment. This category reviews the processes leaders use to deliver customer value and achieve long-term organizational success—its business model. The business model provides the linkage between the organization's strategy and its execution (Bouncken et al., 2019) and is quickly replacing strategy as the primary source of competitive advantage (Snihur & Eisenhardt, 2022). The organization does not use systematic approaches for its operations activities.

Work Processes

The organization uses its critical work processes to deliver its advocacy service to accomplish its mission. These are the critical processes necessary to determine product and process requirements and ensure they continue to meet those requirements as internal or external environmental changes occur. Wurthmann (2020) stated that organizational success relies upon integrated strategies and the successful execution of its plans.

Product and Process Design. Organizations achieving market success provide a product or service that customers are willing to purchase. Although the nonprofit has not defined its critical work processes and requirements, they can be derived from its mission using value chain analysis. A standard analytical tool, value chain analysis, traces the product or service movement through the production process, providing opportunities to differentiate the product or service (Prasetyo & Dzaki, 2020). Table 10 lists the nonprofit's critical work processes, requirements, measures, and results for CAF pension advocacy, membership management, and partnering.

Table 10

Advocacy Work Processes

Work Process	Requirements	Measures	Results
CAF Pension Advocacy	Legislative intelligence and influence	Legislation changes	Table 14
Membership Management	Membership Growth	Paid members Year over year growth	Figure 9 Figure 2
Partnering	Effective partnering	Issue expertise	Figure 8

Leaders independently use their previous experiences and relationships to develop an approach when identifying a new pension-related issue. The board member addressing

the issue relies upon their professional skills and experiences to determine the essential requirements and formulate an appropriate response, including engaging partners to support the organization's work. Canadian Armed Forces pension-related issues arise infrequently, and it has been over a decade since the organization addressed a new issue. Organizational leaders do not use systematic approaches to design and manage critical work processes.

Process Management and Improvement. Board members agree to changes in the nonprofit's advocacy (Table 10) and support (Table 11) work processes through formal motions at the AGM. For example, during the 2019 meeting, the treasurer proposed expanding its investment options to receive a better return. The board approved the motion authorizing the treasurer to invest their funds appropriately. This informal and systematic approach to memorializing critical changes to the organization's operating rhythm is sufficient given the autonomy board members receive pursuing activities supportive of the organization. The association management company uses systematic approaches to deliver the nonprofit's support processes, such as financial management and marketing services (Table 11), as defined by its contractual agreement.

Table 11*Support Processes*

Key Support Process	Requirements	Measures	Results
Financial Management	Deliver quarterly and annual financial reports	Timely and accurate delivery	None
	Create annual budget	Timely and accurate completion	None
Marketing	Increase social media followers	Number of Twitter followers	Figure 4
		Twitter engagement	Figure 5
		Facebook engagement	Figure 3
		Tweets and retweets	Figure 6

Supply Network Management. The nonprofit has one supplier, AMC. The company performs the following services defined in the contract between the nonprofit and AMC: association headquarters; board and volunteer support and general administration; financial management; membership retention and promotion; communications, publications, and newsletters; and website maintenance. Before 2022, the nonprofit's executive director also owned AMC, creating a close connection between the needs of the nonprofit and the third-party company responsible for performing its support functions. Interviews with the executive director and treasurer indicated less than five minor issues in the last 15 years, and a phone call resolved each satisfactorily. The contract between the two organizations is evergreen, allowing either party to exit it with notice. Also minimizing the contract management overhead, the agreement includes an automatic escalation table increasing the fees by 2.5% each April, closely matching the historical inflation rate. Anecdotally, AMC meets the nonprofit's undocumented performance criteria because the contract is renewed annually with no significant issues

reported previously. The nonprofit does not use systematic approaches for selecting and managing its supply network.

Management of Opportunities for Innovation. Innovation in services, business models, marketing, or understanding its members' needs is not evident. Innovation creates new value for stakeholders through meaningful improvements to the nonprofit's processes, products, services, or societal well-being; it requires outcomes that demonstrate discontinuous or breakthrough results (Baldrige Performance Excellence Program, 2020b, pp. 48). The nonprofit does not have systematic processes for managing innovation or innovating its products, services, business model, or critical processes to achieve breakthrough improvements.

Operational Effectiveness

Leaders are responsible for ensuring organizational effectiveness and efficiency, defined by Moura et al. (2022) as achieving social goals and using the nonprofit's resources most prudently. Also included in this category is the security of its information resources, workforce safety, and sustainability. These processes support the cost-effective delivery of advocacy services meeting customer requirements.

Process Efficiency and Effectiveness. Organizational leaders outsourced support activities to AMC, leveraging their core competence in association management. For the critical work process of advocacy, each board member acts independently, developing their response based on their experience and the requestor's requirements. An organization's chances of survival are improved through the adoption of quality management practices that improve operational results, efficiency, and effectiveness

(Parast & Safari, 2022). The board did not evaluate other operational activities (e.g., membership management and partnering) to reduce the nonprofit's costs and efficiency or improve its effectiveness. The organization does not use systematic approaches to manage its operations' cost, efficiency, and effectiveness.

Security and Cybersecurity. The Canadian Centre for Cyber Security (n.d.) defines cyber security as protecting digital information and the associated infrastructure, including detecting, responding, and mitigating damage from an attack or unauthorized access. The association management company does not conduct cyber security training or utilize processes for detecting and mitigating cyber intrusions affecting their information technology data and assets. Each board member performs their governance and advocacy activities using personal computers, tablets, and phones from their homes or other locations. They are responsible for applying the latest security patches, enabling strong passwords, and pursuing appropriate redundancy backups to protect their data and devices. The association management company and board members do not use systematic security and cybersecurity approaches to ensure data and system security.

Safety, Business Continuity, and Resilience. The nonprofit is a virtual organization; board members work from their homes or other locations. The association management company's systems provide critical backup and redundancy for data archived on cloud servers in the event a disaster, emergency, or other disruption affects the ability of the nonprofit to continue its operations. However, data resident on each board member's device may not be recoverable depending on their approaches to ensure adequate data protection from adverse events. Leaders do not use systematic approaches

to ensure business continuity and resilience. However, the nonprofit's virtual organizational structure makes systematic approaches to keeping a safe operating environment unnecessary.

Measurement, Analysis, and Knowledge Management

This category discusses the organization's measuring, analyzing, and knowledge management approaches. Pattanasing et al. (2022) observed that dynamic knowledge management capabilities integrated external and internal information that supported adapting to a changing environment and led to improved organizational performance. Specific topics discussed include the nonprofit approaches to measuring performance, analyzing the data, and using the results for continuous improvement and innovation. Also, data and information and organizational knowledge approaches are discussed.

Measurement, Analysis, and Improvement of Organizational Performance

Processes for measuring and analyzing financial and nonfinancial performance metrics are critical for developing competencies in continuous improvement, innovation, and effectively achieving organizational objectives. According to research conducted by de Waal and Linthorst (2020), they noted a positive causal relationship between an organization's five high-performance organizational factors, including continuous improvement and renewal, and competitive performance. The nonprofit does not use systematic approaches for measuring, analyzing, and improving its organizational performance.

Performance Measurement. Board members define the organization's success as (1) a measurable influence on ministers and government officials related to CAF

pensions and (2) increasing its membership base. However, the nonprofit does not track measures that indicate their influence on ministers or other government officials. The association management company tracks the nonprofit's finances and membership and provides it to board members upon request. Organizational leaders do not compare their financial or membership performance with other organizations.

The Baldrige Performance Excellence Program (2020a) noted that comparisons enable establishing stretch goals and identifying the levels needed to achieve breakthrough innovations. The performance measurement system gives the board and stakeholders visibility into the organization's operations. Cestari et al. (2022) observed that an effective performance measurement system engenders legitimacy, transparency, effectiveness, and efficiency with its stakeholders. As stakeholder salience increases and decreases, leaders require the ability to flex the system to accommodate environmental changes or stakeholder requirements. Other than tracking its finances quarterly and membership annually, the organization does not use systematic processes to track data and information on daily operations and overall organizational performance, select comparative data, or ensure that the performance measurement system is responsive to rapid or unexpected changes.

Performance Analysis and Review. Two critical areas the nonprofit measures its performance are finances and membership. The association management company (a) closes the financial records each month, (b) provides a quarterly financial report to the board treasurer, (c) he reviews the draft statements, asks questions as appropriate, and (d) approves the financial statements. Membership renewals are due annually, and reminder

notices are placed in the newsletter and posted to the website for the coming year.

Membership is tracked monthly by AMC and reported to the board as requested.

Marketing activity is a potential two-way communication vehicle for reaching members and stakeholders. The organization does not use action plans, removing a critical opportunity to assess overall performance by comparing progress toward objectives. The organization does not use systematic processes for analyzing its limited results, nor is most operational data available.

Performance Improvement. Nonprofit leaders find delivering measurable results related to their mission increasingly challenging. Do and Mai (2020) found that organizations competing in an increasingly volatile business environment must continuously reinvent themselves to remain viable entities. Two vital elements needed for reinvention are understanding expected future performance and measuring progress. Because the nonprofit does not use action plans or set performance targets, it cannot collect data and information from its operations and advocacy activities necessary to support reinvention. Organizational leaders do not use performance review findings to project future performance, develop priorities for continuous improvement, or innovate.

Information and Knowledge Management

This section discusses the organization's approaches to managing its knowledge assets, including ensuring that data is accurate and available, new knowledge is managed, best practices are identified and shared, and the knowledge is used to drive significant changes and innovation. The Baldrige Performance Excellence Program (2020b, pp. 49) stated that knowledge assets are the accumulated expertise leaders can use to improve

sustainability. The nonprofit does not use systematic processes for its information and knowledge management activities.

Data and Information. The organization maintains its files in two locations: (1) AMC's Microsoft OneDrive for its work on behalf of the nonprofit and (2) each board member's computer or cloud drive for individual governance and advocacy activities. The association management company's data resides with Microsoft OneDrive with a backup to a secondary cloud service for redundancy. Access to OneDrive is controlled by active directory and user accounts, enabling only those needing access to the data. A detailed audit trail is available for these files. All systems and servers operate the most recent anti-malware and zero-day threat protection versions. An enterprise firewall, gateway antivirus, content filtering, site blocking, and intrusion prevention secure the data. A locked office cabinet stores the nonprofit's physical files. The association management company uses systematic approaches to verify and ensure high-quality organizational data and information are available.

Board members are personally responsible for ensuring that data and information for their governance and advocacy activities are available and accurate. Personal computers, emails, and cloud storage drives are typical archival locations for these files. They are not stored on a centralized server nor do they include the same degree of data quality and availability rigor provided by AMC's cloud storage. The board president keeps some paper files in his home office. Board members do not utilize systematic approaches to ensure the quality and availability of organizational data and information stored on personal devices.

Organizational Knowledge. Identifying and sharing best practices helps organizations improve. One form of enabling sharing is through board interlocks. Board members form a social network that facilitates sharing knowledge, practices, and policies (Bloch et al., 2020). Another method available to the nonprofit is the executive director's extensive experience with nonprofit governance activities through his prior ownership in the AMC. For example, the treasurer developed an investment policy for the nonprofit and, before drafting, asked the executive director whether he had information that would help. The executive director provided a best practice from another of AMC's clients, improving the policy. These informal approaches for identifying and sharing best practices result from a board member seeking information—not a systematic process for identifying and sharing organization-wide. Minimal systematic approaches to managing the organization and the one annual board meeting hinder efforts to implement best practices. The organization does not use systematic approaches for managing knowledge, identifying and sharing best practices, or using knowledge and resources to embed learning in its operations.

Collection, Analysis, and Preparation of Results

The first part of this section provides the thematic findings derived from the semistructured interviews, review of archival documents, and public information. A theme encapsulates a repetitive pattern in the data related to the research question (Braun & Clarke, 2006). Also, Lochmiller (2021) observed that thematic analysis is predicated on reliable and trustworthy data collected using what or why interview questions and documented artifacts.

The second part of this section describes the nonprofit's results relative to organizational performance and improvement for critical areas of importance, including product and process; customer; workforce; leadership and governance; and financial, market, and strategy. I evaluated the process categories using approach, deployment, learning, and integration, and results evaluation factors of levels, trends, comparisons, and integration (Baldrige Performance Excellence Program, 2020a, pp. 29–30). Also, the Baldrige program publishes considerations for reviewing small organizations, defined as those with 500 or fewer employees (Baldrige Performance Excellence Program, 2022). The nonprofit client is governed by seven board members that also serve as the organization's workforce, meeting the criteria for "small." Except for membership, finances, and limited social media, the organization does not track the results of operations or advocacy activities.

Thematic Findings

The purpose of this qualitative single case study was to explore the strategies some nonprofit leaders used to increase membership in a Canadian nonprofit protecting the rights and benefits of retired military personnel. The research question for this study was: What strategies do some nonprofit leaders use to increase membership in a Canadian nonprofit protecting rights and benefits of retired military? I collected data from semistructured interviews, archival records, and public data. The thematic findings were determined from analysis of the four semistructured interviews, a review of the organization's archival data, and publicly available information. I conducted a thematic analysis of the data and identified the following themes: (a) marketing reach, (b)

membership value proposition, (c) nonprofit strategy and mission, and (d) board governance.

Thematic Finding 1: Marketing Reach

This theme has two connected aspects: (1) the ability to contact veterans and gain insights relevant to pension gaps and (2) pain points relative to reentering civilian society upon completing their military service, whether they served for 5 or 30 years. Before 2014, the nonprofit inserted a flyer into the Department of National Defense's mailing sent to all retirees. This mailing was the nonprofit's only source of communication with potential members, and its removal was a significant limitation to contacting pensioners and veterans. The effectiveness of this recruiting method was noted by its inclusion in the 2013 flyer which resulted in a significant increase in membership, followed by an immediate decline the following year and every year since. Three of the four board members interviewed noted that the inability to contact pensioners and veterans was a significant challenge in the nonprofit's ability to increase its membership. For example, participant 3 (P3) said they could not contact recently separated CAF members, and participant 4 (P4) noted it was difficult to reach CAF members completing the Second Career Assistance Network program. This inability to contact pensioners and veterans removed the organization's crucial listening system.

The membership decrease reduced the nonprofit's revenue and removed its critical customer listening system, enabling a two-way dialogue with essential stakeholders—its members. Participant 1 (P1) noted that during the 1990s, the organization relied upon its members to communicate their collective concerns that

influenced its advocacy activities. The board of directors used these concerns to determine whether they could offer a membership benefit to solve the need until pension plans improved. Participant 2 (P2) observed that the 600 remaining members are insufficient to discern their needs or determine pension gaps effectively. Furthermore, P3 noted that the needs of veterans and pensioners today differ from previous generations, and the need for access to them limits their ability to develop new services. Extending services beyond its current members to other stakeholders and veterans requires enabling a two-way dialogue to understand their concerns.

Thematic Finding 2: Membership Value Proposition

The membership value proposition provides members with a periodic newsletter and access to discounted home and auto insurance. The continued decrease in members indicated that the membership value proposition needs to be updated to reflect the needs of potential members. Rintamäki and Saarijärvi (2021) observed that the customer perspective is how they perceive value and connects themselves with the company. P1 said that in the late 1990s before dental benefits were included in the CAF pension, the nonprofit included a discounted dental plan in their membership benefits that drove enrollments. Most recently, the discounted auto and home insurance benefit appears to be a significant retention factor for those members that renew their membership. As overall membership decreased from 2,700 (2014) to 600 (2023), members enrolled in the auto plan increased from 30 to 265 and in the home plan from 10 to 181 (Figure 3).

Initially, the membership benefits aligned with the nonprofit's advocacy agenda partially drove membership growth. Today, there is a misalignment between the

membership benefits and the nonprofit's mission or advocacy tactics. All four board members stated that the customer (i.e., member) value proposition needs revision once they develop a new organizational mission. P4 further noted that CANEX provides many discounted products and services to Canadian veterans, reducing the previous membership draw. P2 noted that altruistic reasons are only part of the reason members join and retain membership in an organization, and P4 said that volunteer opportunities—veterans helping veterans—could be a component of a comprehensive membership value proposition. Ebbers et al. (2021) found that becoming a member includes the relationship value provided through membership. Members need a viable value proposition with reasons to join and align with the nonprofit's mission. Extending membership beyond pensioners can provide greater stakeholder reach, financial stability, and an improved understanding of veterans' concerns.

Thematic Finding 3: Nonprofit Strategy and Mission

The organization's mission statement, focused on improving and protecting CAF pensions through advocacy, must be updated. Advocacy includes encouraging stakeholders to support the nonprofit's objectives through supporting specific policies, lobbying government officials, or educating the public through a campaign (Shetler, 2021). The nonprofit's only mission-focused advocacy activity since the early 2000s is participating with an MSIN to remove the marriage after 60 survivor's pension clause. Gee et al. (2022) found that advocacy nonprofits increase their level of political influence by increasing the number of their volunteers. As the number of members decreased, so did its ability to engage government policyholders.

Three board members interviewed stated that pension advocacy is no longer a significant concern, and the organization needs to find a new focus. Boland et al. (2022) observed that nonprofit boards and leaders are responsible for developing the organization's strategy and associated resource plan to achieve its objectives. AlQershi (2021) found that strategic planning is the organizational process used to determine its vision and strategies and subsequent assignment of human resources. P4 observed that many organizations serve veterans, and finding unresolved pain points is critical to creating a new mission. Significant changes in CAF pensions, larger and more effective advocacy organizations, and the continued decrease in members combined to describe an organization that needs to reinvent itself, understand veterans' (prospective customers) issues, and develop products or services that meet their needs. Patterson (2018) suggested a three-step process to engage nonprofit boards with generative thinking: ask bold questions, discuss the local and regional landscape, and plan how to move the ideas forward. Through strategic planning, board members can identify new veteran-focused opportunities to engage their stakeholders, increase membership, and deliver more value to its communities.

Thematic Finding 4: Board Governance

The nonprofit's inability to contact potential members and obtain actionable information supporting operations is a known and mostly unaddressed issue. Lincoln et al. (2019) suggested that boards must think strategically, ensuring the nonprofit moves in the right direction. For example, the treasurer highlighted declining membership and membership revenue at every AGM from 2016–2020 and then again in 2022. According

to a finding by Hung and Hager (2019), a financially solvent nonprofit has adequate equity to fund operations, positive operating margins, and differentiated revenue sources. In 2016 the treasurer remarked that membership revenue was the lowest in recent history and reminded board members that the Department of National Defense removed third-party literature from their pensioner mailings, depriving them of an efficient and economical method of reaching potential members. The treasurer reinforced this inability to reach potential members in 2017, reporting that the organization's ability to operate profitably was in jeopardy without effectively and economically recruiting new members—a priority for the organization.

Islami et al. (2020) noted that strategy evaluates the current environment and responds to opportunities and threats as needed. Board members had sufficient information to modify the nonprofit's strategy and mission to address the fundamental changes to their operating environment, highlighted by their inability to recruit and retain members. However, the board elected to take minimal action to overcome the membership threat. In 2017, the board of directors authorized the addition of marketing inserts into the Royal Canadian Legions magazine, resulting in 20 new members. The insert cost was \$4,000, resulting in an unsustainable acquisition cost of \$200 per member. Since their unsuccessful campaign, the board has not pursued other membership recruiting or retention activities. The loss of significant membership revenue was a symptom of a larger problem. The four board members interviewed noted that CAF pensioners were generally content with their benefits. More directly, P4 stated that pension advocacy is unnecessary, there are no issues requiring advocacy, and the

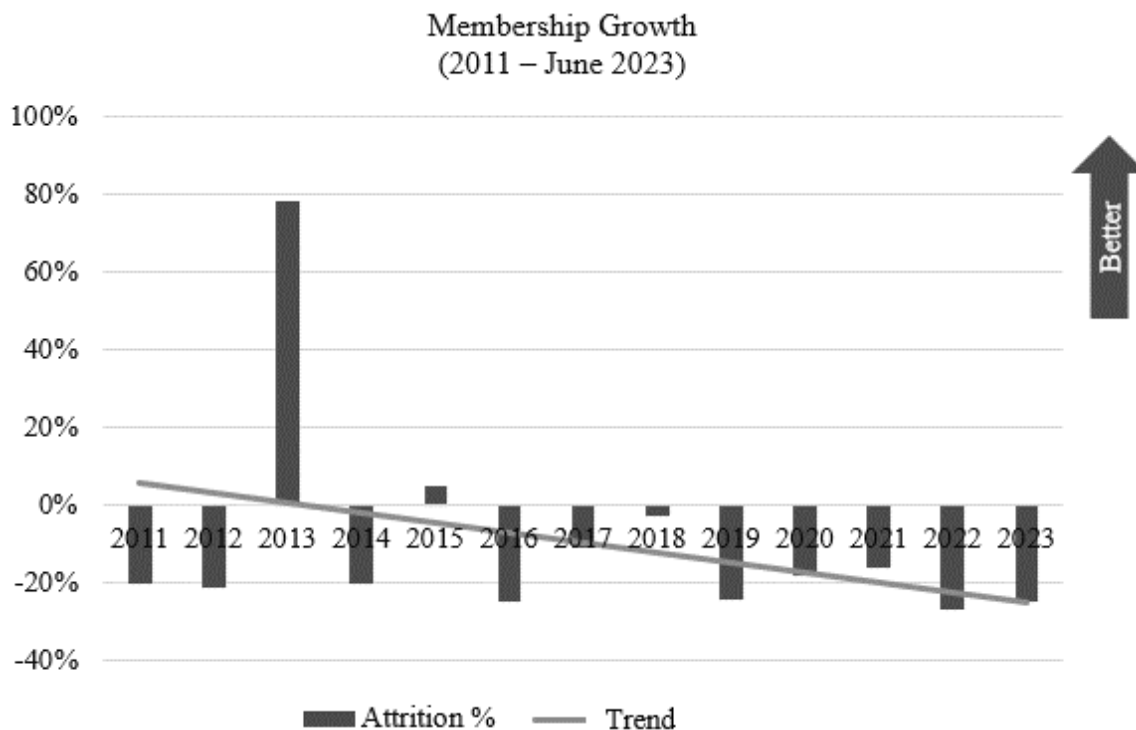
nonprofit's focus on pensioners is passé. The AGM minutes reviewed from 2017–2022 did not reflect any discussion regarding the reduced need for CAF pension advocacy or strategies to develop new products or services. Patterson (2018) suggested that boards ask themselves whether the organization is still serving its community years after its founding. Although not materially affecting the organization's finances, the board of directors' inactivity resulted in the lack of an impactful mission serving the needs of veterans and pensioners—one that members and other stakeholders can support financially and nonfinancially.

Product and Process Results

This section describes the nonprofit's product and operational performance results for its customer services, work process effectiveness, safety and emergency preparedness, and supply network management. The Baldrige criteria commentary notes that this category results reflect service value leading to customer satisfaction and engagement (Baldrige Performance Excellence Program, 2020a, pp. A-18). The organization's primary service is advocacy, which has limited applicability since the early 2000s, primarily focused on repealing the marriage after 60 clause in the CAF pension. Table 14 describes the issues addressed during the organization's history. Other operational performance results for the nonprofit's critical work and support processes are membership growth (Figure 9), financial management (Figures 7 and 8), and social media performance (Figures 3–6). The association management company, the nonprofit's only supplier, meets requirements as demonstrated by less than five quickly resolved issues during its 10-year tenure and ongoing renewal of its contract.

Customer Results

The nonprofit customers (i.e., members) are also CAF pensioners or their survivors. The Treasury Board of Canada Secretariat (2022) stated that, as of March 31, 2022, there were 113,730 pensioners and 71,929 active members. Changes to CAF pensions affect the nonprofit's members, pensioners, and active members—regardless of the source of the change. The board members with military backgrounds informally polled their networks to understand current or potential pain points with CAF pensions. The consensus was that the pension benefits were mostly sufficient, and pensioners had few concerns. These informal conversations within their networks noted issues such as Agent Orange exposure, not being out of the country for more than 39 days to keep medical benefits, and trouble accessing medical pension benefits, which only affect a small segment of pensioners. Membership growth is a reliable indicator of customer satisfaction and shows a negative trend for the last 8 years, with only two favorable years since 2013 (Figure 2).

Figure 2*Year-Over-Year Change in Membership*

One positive membership trend the organization experienced is growth in benefits usage. The nonprofit offers members a discounted auto and home insurance plan, and usage has increased while total membership has decreased. Figure 3 reflects a favorable trend in insurance benefits used from 2014–2022, while the total membership decreased during the same period. Figure 4 reflects insurance benefit usage increasing from 10 (home) and 30 (auto) in 2014 to 181 (home) and 265 (auto) in 2022. Discounted insurance plans increase the stickiness of members.

Figure 3

Insurance Benefit Usage

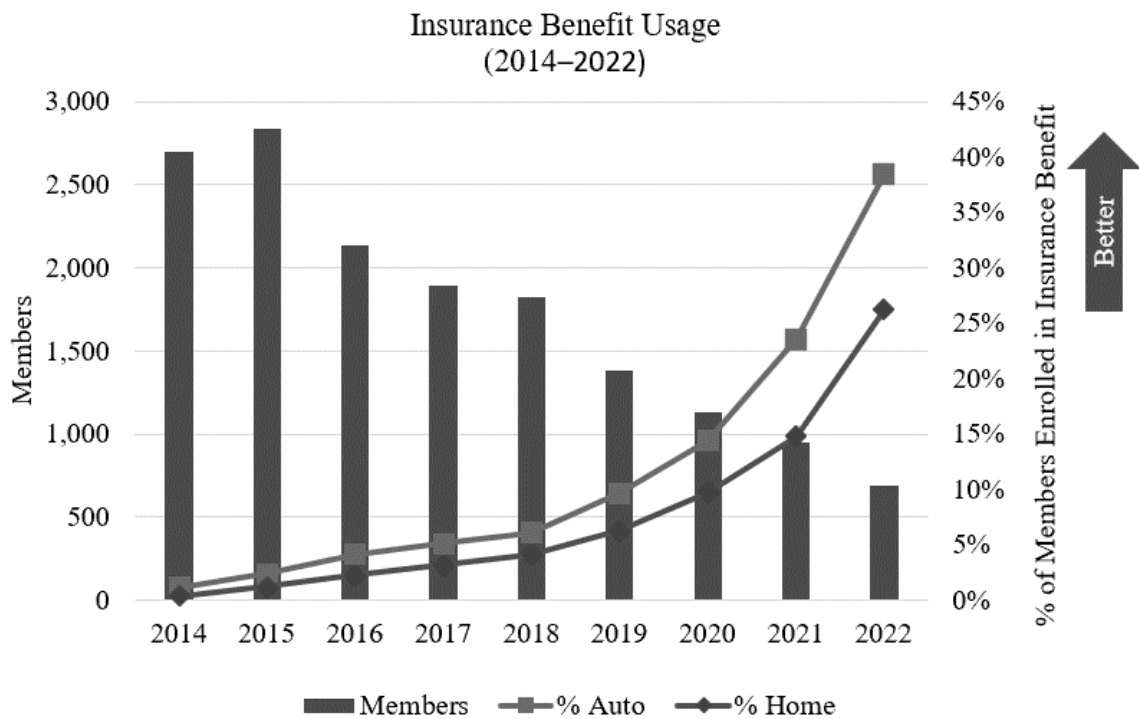
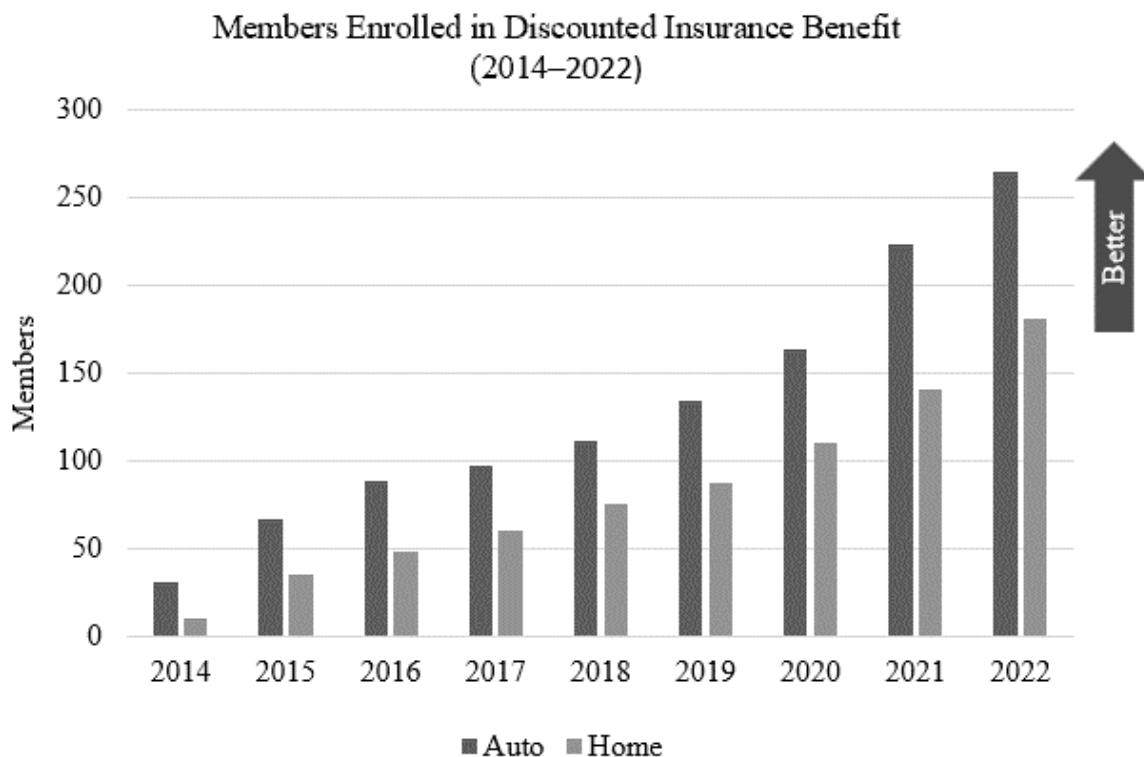
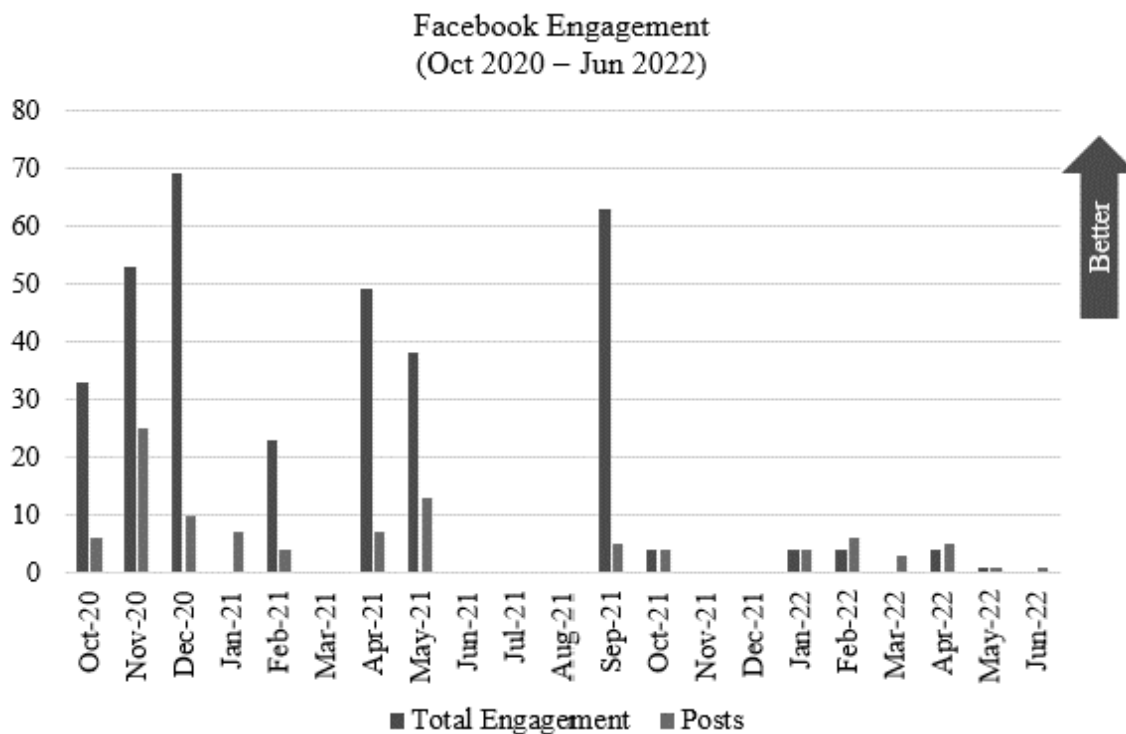


Figure 4*Year-Over-Year Change in Membership*

Engaged members provide the organization with CAF pension gap insights and can promote the nonprofit’s initiatives with government policymakers. Figenschou and Fredheim (2019) remarked that organizations could build network capital, making them relevant to political decision-makers by providing compelling information, establishing vibrant online communities, and engaging in campaigns that matter to their stakeholders. The nonprofit opened its Facebook and Twitter accounts in September 2013 to support its growth, communicate relevant information regarding potential CAF policy changes, and create a two-way dialogue with its stakeholders. Users’ engagement with a nonprofit is directly influenced by the size of the nonprofit’s network, the frequency of posts, and the

number of conversations it engages with (Mato-Santiso et al., 2021). An effective social media strategy can build its member base, improve the nonprofit's relevance to policymakers, and develop stronger stakeholder engagement.

The nonprofit's Twitter and Facebook accounts reflect limited engagement and ceased activity in February and June 2022, respectively. Facebook's engagement (Figure 5) reflects single-digit posting and user responses from September 2021, limiting the site's effectiveness. Facebook and other internet properties benefit from relevant updates that keep users engaged. Figenschou and Fredheim (2019) observed that Facebook campaigns designed to mobilize members or other stakeholders (i.e., the public) supporting a cause require compelling and engaging content to be highly shareable.

Figure 5*Facebook Engagement*

The nonprofit uses Twitter as another venue for reaching its stakeholders, with limited success. The number of followers as of July 2023 is 244, essentially the same number as October 2020, demonstrating a flat trend without growth (Figure 6). The nonprofit ascertains engagement through responses to the organization's tweets, with minimal posts and responses during the last three years (Figure 7). Figure 8 shows aggregated tweets posted by the organization and those it retweeted from other organizations. The number of tweets declined significantly from a high of 189 in 2018 to none since February 2022. Johansson and Scaramuzzino (2019) found that advocacy groups used Twitter to reach policymakers, influencers, and journalists. Without a vibrant

Twitter presence, the nonprofit limits its influence with members, policymakers, and other stakeholders supporting their mission.

Figure 6

Twitter Followers and Following

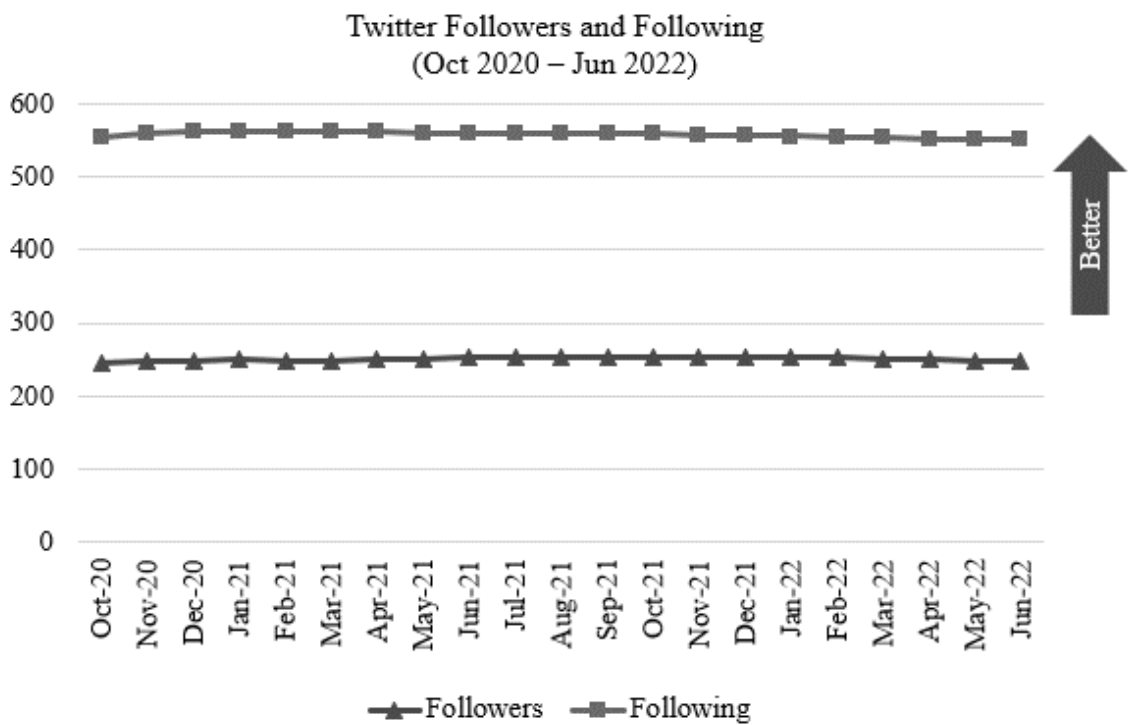


Figure 7

Twitter Engagement

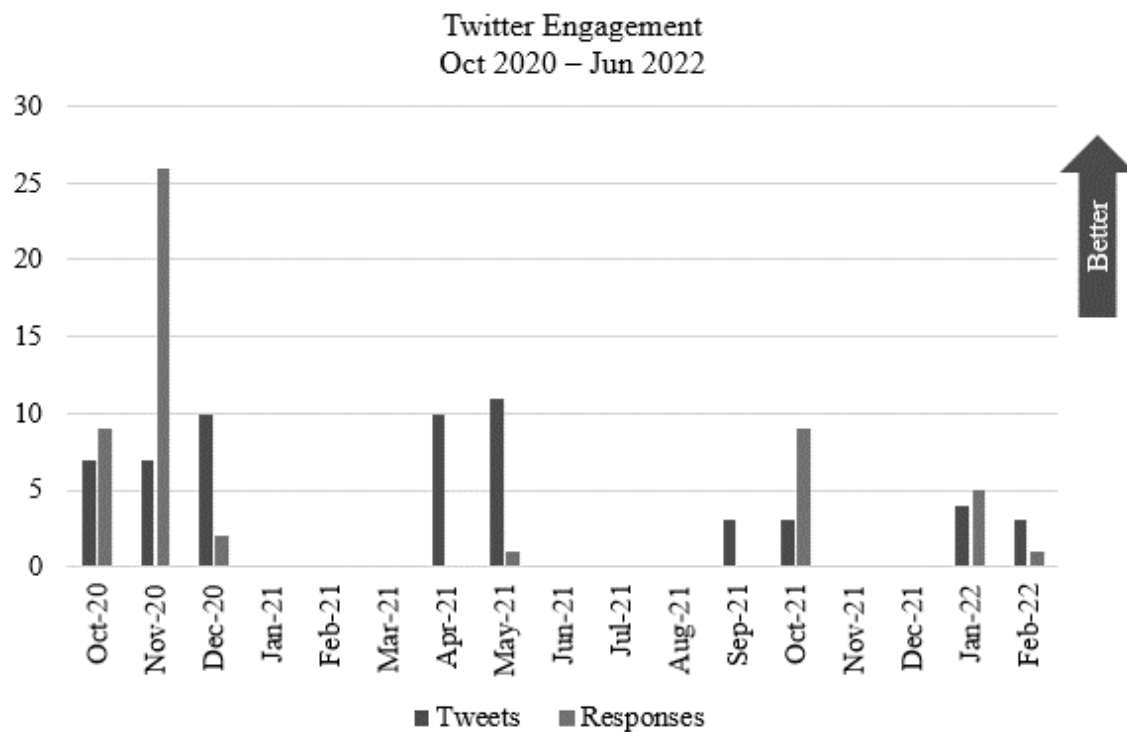
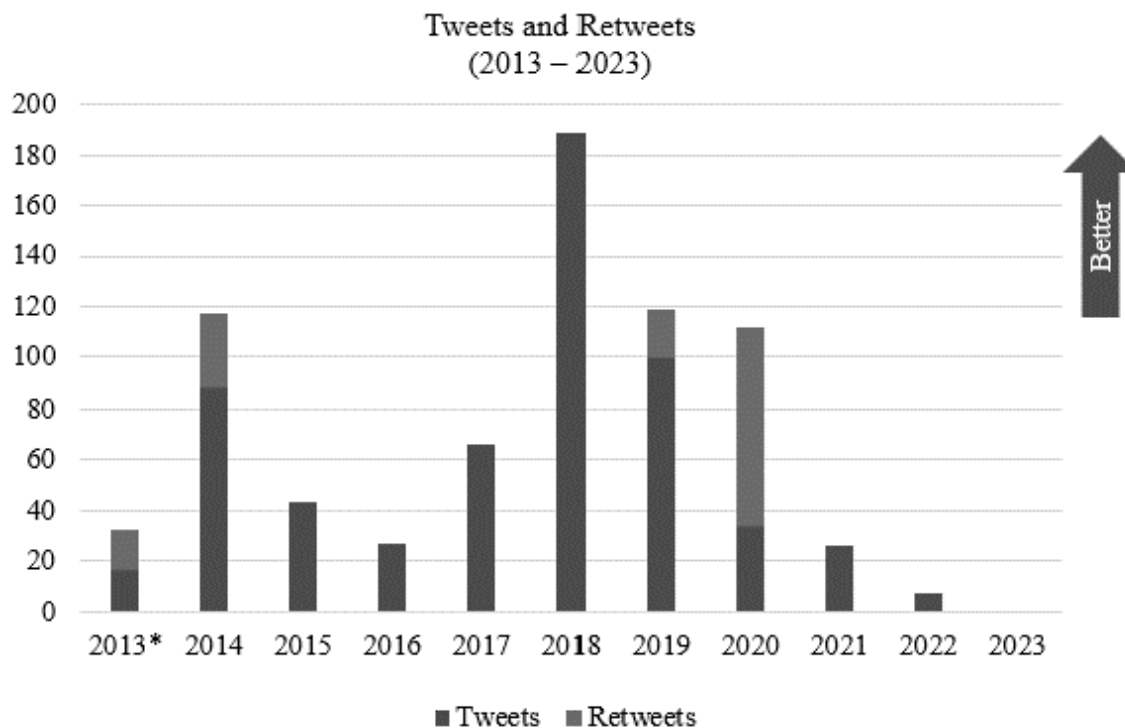


Figure 8*Tweets and Retweets by Year*

Note: * September through December

Workforce Results

Nonprofit leaders need people to manage their organization's administrative and mission-based activities. Conaty and Robbins (2021) noted that nonprofit organizations have three primary internal stakeholders: the board of directors, management, and volunteers. The nonprofit board of directors is the organization's governance, leadership, management, and advocacy workforce. The association management company performs the administrative, marketing, and financial activities in close collaboration with the

nonprofit executive director and other board members. The nonprofit members are its volunteers—not engaged with the organization.

Gee et al. (2022) observed that advocacy nonprofits' political influence increases with the number of volunteers, and pressuring governmental decision-makers is the most useful nonprofit advocacy strategy. Board members are engaged with the organization, reflecting a median service of 9 years and the longest-serving member approaching 27 years of continuous service. Members, or volunteers, are not engaged with the organization as indicated by no one attending the AGM for as long as the board members can recall and declining membership.

The nonprofit board members leverage their knowledge to complete its governance and advocacy activities. The selection of new board members informally accounts for diversity, inclusion, and equity, and business skills gaps. The board members' diversity, inclusion, and military service (Table 12) and business skills inventory (Table 13) highlight future needs. With the nonprofit's only focus in the last 20 years supporting repeal of the marriage after 60 clause in CAF pensions, there has yet to be a need to inventory or develop new skills. Zhang and Guo (2020) observed that the effectiveness of a nonprofit at advocacy is related to the organization's resources (internal approach), close relationships with the government (external approach), and a combination of insider and outsider tactics (strategic). Using the researchers' definitions (Appendix B) for insider (directly with policymakers) and outsider (with others) tactics, board members self-assessed their advocacy skills (Table 14).

Table 12*Diversity, Inclusion, and Military Service*

Tactic	Board Member						
	1	2	3	4	5	6	7
Diversity and Inclusion							
Gender	M	M	M	M	F	F	F
Ethnicity	FN	C	C	C	C	FN	C
Generational Cohort	B	P	P	B	M	M	X
Province	ON	ON	ON	QC	ON	ON	ON
Market Sector	Bus	NP	NP	Bus	Bus	Bus	Bus
Language Proficiency	Dual	Dual	Dual	Dual	Dual	Dual	E
Military Service							
Veteran	Yes	Yes	Yes	Yes	No	No	No
CAF Pension	Yes	Yes	No	No	No	No	No
Disability Pension	Yes	No	No	No	No	No	No

Note. Ethnicity is First Nations (FN) or Caucasian I; Generational cohorts are post-war (P), baby boomer (B), generation X (X), or millennial (M); Market sectors are business (Bus) or nonprofit (NP); and Language proficiency in English I or English and French (Dual).

Table 13*Business Skills Inventory (Self-Assessed)*

Tactic	Board Member						
	1	2	3	4	5	6	7
Marketing	X		X			X	X
People	X					X	X
Legal				X			
Finance	X	X			X		
Operations	X		X			X	
Strategy	X		X			X	
Technology	X		X			X	

Table 14*Advocacy Skills Inventory (Self-Assessed)*

Tactic	Board Member						
	1	2	3	4	5	6	7
Insider Advocacy							
Direct Lobbying	X						
Judicial Advocacy							
Administrative Lobbying	X					X	
Expert Testimony							
Outsider Advocacy							
Research	X	X				X	
Media Advocacy						X	
Social Media Advocacy	X					X	
Grassroots Lobbying							
Public Events & Direct Action	X					X	
Public Education	X					X	
Coalition Building	X						
Electioneering	X						

Leadership and Governance Results

Nonprofit organizations need to maintain public trust to carry out their mission effectively. Becker et al. (2020) found that the most valuable asset for a nonprofit is public trust and they defined trust as the nonprofit's ability to meet stakeholders' expectations for reliability, credibility, and reputation. Leadership and governance, compliance with laws and regulations, ethical conduct, and supporting its key communities are critical aspects engendering public trust in a nonprofit. Table 15 provides governance, regulatory, and ethics results.

Table 15*Governance, Regulatory, and Ethics*

Process	Indicator	Results							
		2016	2017	2018	2019	2020	2021*	2022*	
Governance									
External Audit	# of Issues	0	0	0	0	0			
Law and Regulation									
Compliance with federal laws and regulations	File Tax Forms	100%	100%	100%	100%	100%	100%	100%	100%
Ethics									
Ethical conduct	# of breaches	0	0	0	0	0	0	0	0

Note: * Preliminary financial statements

Financial, Market, and Strategy Results

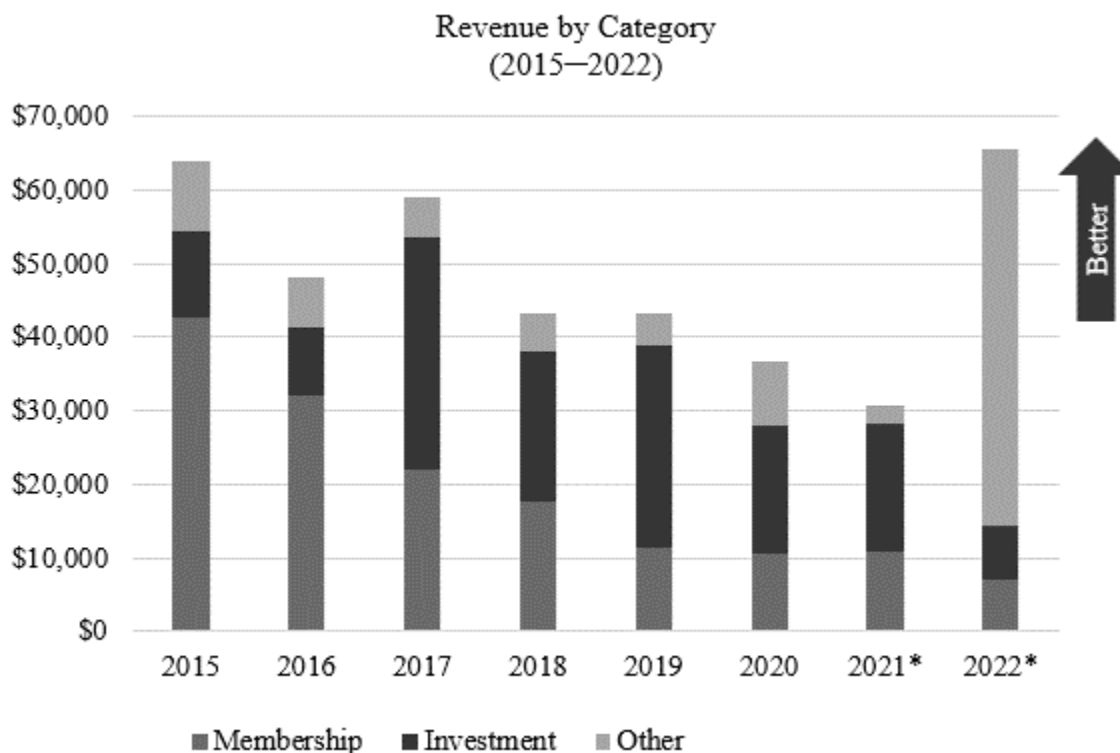
Results reported in this item provide insight into the nonprofit's financial, market, and strategy position—an overall indicator of the success of the organization's strategic execution. Feldman (2020) found that strategy fundamentally seeks to answer the question of what factors contribute to sustainable competitive advantage and how managers establish and oversee organizational performance. Financially, given its favorable position, the nonprofit can continue its operations and seek new opportunities without needing an influx of capital.

Financial Performance. The nonprofit tracks its financial results. The treasurer reviews monthly financial reports, and the board approves the budget at their annual meeting. Membership dues revenue shows an unfavorable trend since 2015 and investment revenue shows an unfavorable trend since 2019. In the 2019 AGM, the board

authorized a change to the organization’s investment strategy, moving from guaranteed investment contracts to other secure investments. However, the pandemic placed this plan on hold, reducing the short-term return until the treasurer identifies other secure investments. Income from all sources typically gives the nonprofit sufficient operating capital to continue its operations. Figure 9 reflects the total annual revenue from the organization over the last five years.

Figure 9

Revenue from Membership Dues, Investments, and Other



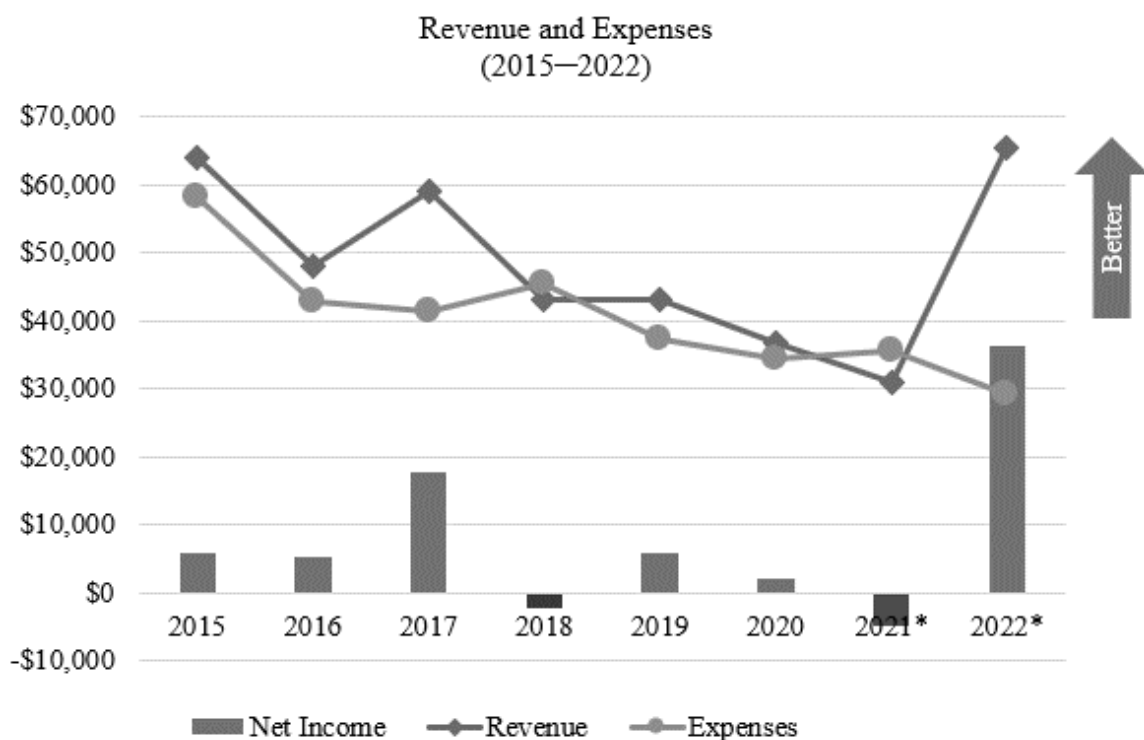
Note: * Preliminary financial statements

Expenses are minimal and consist mostly of monthly payments to AMC. Board members do not receive remuneration for their work on behalf of the organization, nor

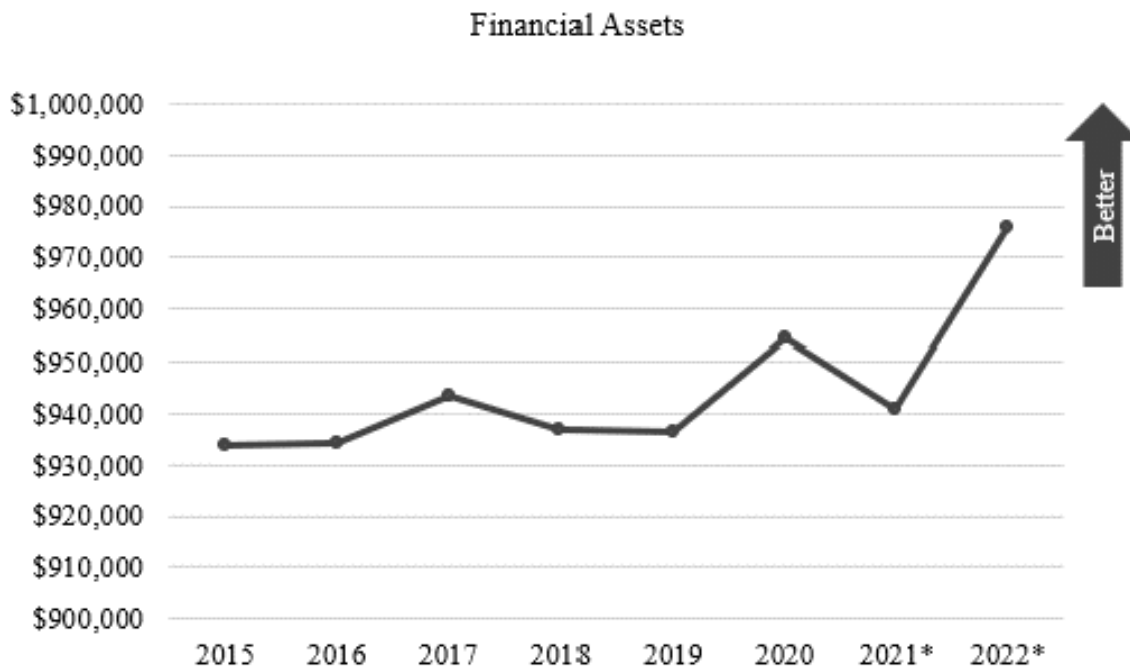
have they requested reimbursement for out-of-pocket expenses incurred on behalf of their work for the organization. Figure 10 displays the last 8 years’ income, expenses, and net income reflecting strong financial solvency. The board of directors demonstrated excellent fiscal management as indicated by the organization’s financial assets (Figure 11) that have rebounded from the pandemic.

Figure 10

Total Revenue, Expenses, and Net Income



Note: * Preliminary financial statements

Figure 11*Net Financial Assets*

Note: * Preliminary financial statements

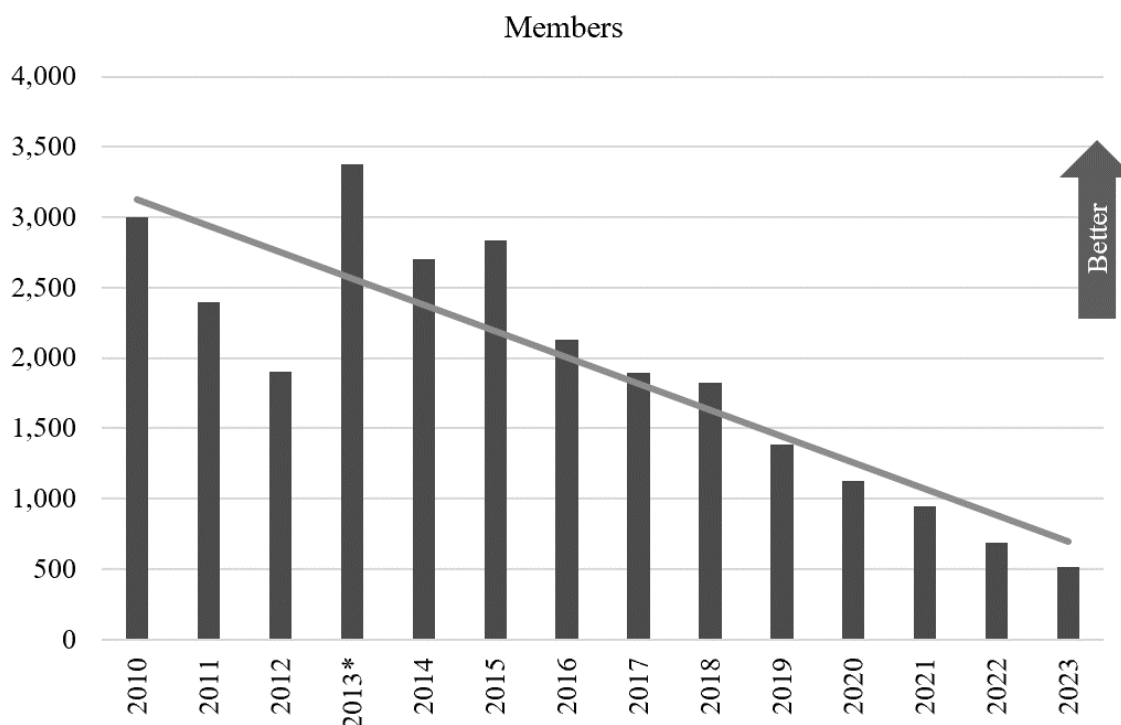
Marketplace Performance. Nonprofit organizations measuring their marketplace results may include donations, government or organizational grants, new programs offered, or the number of volunteers. The Baldrige Performance Excellence Program (2020b, pp. 28) noted that standard measures of marketplace performance are market share and new markets entered, and for nonprofits, charitable donations, grants, and new services offered. The nonprofit is financially sound, their market includes all CAF pensioners, and they have not offered any new services to this market.

Strategy Implementation. The board of directors informally aligned on two strategic objectives: increasing membership and maintaining current revenue. The third

strategic objective considered is advocacy effectiveness, measured by successful interventions. The organization tracks and reports its paid membership (Figure 12) since 2010, the first year numbers were available. There have been two membership campaigns in the last 10 years. The first was the organization's insert into a government 2013 CAF pensioner mail-out, resulting in about 1,500 new members. Since losing this capability in 2013, membership has continued to decline. The board conducted a second campaign in 2018–2019, inserting 156,500 inserts into the Royal Canadian Legion's magazine. They estimated that it only acquired about 20 new members at an acquisition cost of \$200 each.

Figure 12

Membership



Note: * Flyer inserted into Veterans Affairs Canada mailer to all pensioners

When advocating for changes to federal policies or programs that apply to all provinces, interventions can take decades to see the changes reflected in governmental legislation. Sabatier (1988) stated that changing government policy can require at least a decade of learning brought about through the cumulative effects of research findings and ordinary knowledge. Table 16 lists the five advocacy issues participated in since the organization's founding.

Table 16

Advocacy Issues

Title	Date	Description
Job Accreditation	1977	Provided trade-related civilian job credit for military skills acquired (e.g., carpentry, mechanic, driver)
Second Career Assistance Network	1978	Program to help CAF members and their families transition from the military to civilian life.
Unemployment Insurance Bill C-50	1987	The legislation enabled retirees to obtain unemployment payments from civilian jobs that started after their retirement.
Pensioners' Dental Services Plan	2001	The legislation provided dental benefits to the retired military.
Marriage after 60	Anticipated in 2023	This effort supports providing Canadian Armed Forces retirees' survivors with pension benefits when the marriage occurs after their 60 th birthday.

Key Themes

I developed the key themes from an analysis of the strengths and opportunities for improvement determined from my examination of the seven BEP categories: (1) leadership, (2) strategy, (3) customer, (4) measurement, analysis, and knowledge management, (5) workforce, (6) operations, and (7) results. Small businesses can utilize

the BEF to diagnose and improve business outcomes in areas of customers' and employees' levels of satisfaction and engagement, product and service outcomes, revenue and market share, and social responsibility (Parast & Safari, 2022). According to Garfield et al. (2022), embedding the Baldrige framework and criteria deep into an organization's culture is transformational. I used the 2021–2022 BEF and the considerations for reviewing small organizations to develop the key themes.

Process Strengths

The nonprofit is in the early stages of defining systematic approaches supporting its governance activities. For example, the board of directors uses informal systematic approaches for managing changes to the board of directors, regulatory filings, and management of work. For example, two board members identified capability and skills gaps in the organization and recruited new members subsequently approved by the board. When new board members join the organization, their core capabilities are explored and aligned with operational activities that utilize their skills. Utilizing the core competencies of the AMC, regulatory and tax filings are completed and submitted on time, ensuring the board remains compliant. The AMC resolves complaints effectively, and stakeholders have multiple methods for contacting the organization. Expanding their systematic approaches towards other areas of the organization will help ensure their sustainability.

The board of directors' personal actions demonstrate their commitment to operating the nonprofit in a highly ethical manner. Although board members do not sign annual ethics statements, results from discussions with board members indicate no adverse ethical incidents, audit issues, or missed tax filings (Table 15). The executive

director also reported no customer complaints occurred in the last decade. Another aspect noted during discovery is that several board members serve on multiple nonprofit boards, reflecting their commitment to effective governance and high personal ethical standards. The nonprofit complies with all applicable regulatory requirements to operate as a noncharitable nonprofit. Continuing to govern ethically and transparently can help the organization with its partnering opportunities as it develops new services and seeks others to support deployment.

Process Opportunities

The nonprofit does not use integrated systematic approaches in most areas of the organization critical to its success. Systematic processes are missing for establishing mission, vision, and values, listening to current and future customers, and stakeholders, conducting strategic planning, and developing new products and services. Board members interviewed and review of AGM minutes reflected no activity to review and update the nonprofits mission, vision, and values. In 2013, the Department of National Defense stopped accepting flyers from nonprofits to include in their mailings to all CAF pensioners, significantly impacting new and renewing members. The significant improvement in CAF pensions, the increased influence of Federal Retirees, and decreased membership indicates an opportunity for the organization to reinvent itself to support other veteran needs. Establishing a systematic strategic planning process aligned with potential customer listening systems and developing compelling customer products and services supports organizational leaders' desire to recruit and retain members and positively affect veterans.

Lack of data and visibility into organizational performance limits leadership's ability to manage its activities. The organization does not utilize action plans to monitor progress toward its strategic initiatives. Furthermore, without clear plans and timelines, leadership cannot utilize data to measure progress, ensure the effective use of resources, and receive early indicators of changes to their operating environment. Implementing systematic action planning and performance analysis processes aligned with customer listening and strategic planning processes can provide the board of directors with ongoing visibility toward accomplishing its strategy.

Results Strengths

The organization's leaders demonstrated favorable levels and trends in governance results. For example, the nonprofit's net assets showed favorable trends when accounting for the pandemic impact on most organizations. As membership revenue declined, the board of directors also reduced expenses to ensure the organization remained sustainable, preserving capital for the work necessary to reinvent itself. Since 2016, the audited financial reports did not have any findings, regulatory tax filings were completed on time, no customer complaints were noted, and no ethical incidents were reported. The nonprofit board should extend its effective governance management strategies to other critical areas of the organization to enhance its long-term sustainability.

Results Opportunities

The organization reports few results for areas critical to organizational success and sustainability. For example, no results are provided for strategic and action planning,

listening to current and future customers, and stakeholders, advocacy activities, action plan performance, or developing new products and services. The missing results are directly associated with the organization's need to implement systematic processes and track their results. Leaders developing and implementing systematic processes for critical activities should concurrently develop the appropriate performance management system with defined metrics and goals. Visibility to the organization's operations can support leadership's ability to understand progress towards and make necessary adjustments to its strategic objective accomplishment.

The organization reported unfavorable levels and trends in its social media activities. For example, since October 2020, Facebook posts and stakeholder engagement decreased to virtually none in June 2022, with no activity since (Figure 5). Twitter followers have been virtually flat since October 2020 (Figure 6), and tweets have shown an unfavorable trend since 2018, with the last post in February 2022 (Figure 8). Social media is a cost-effective medium for reaching and engaging in a two-way dialogue with critical stakeholders, including members, partners, veterans, and government policymakers. Reinvigorating its social media channels to promote the organization's new strategy and offerings can help attract and retain members and build its brand.

Project Summary

The nonprofit leaders noted that the environment changed, which led to decreasing membership and a sense that during the last 20 years, their mission of ensuring fair CAF pensions was successful. Ali (2018) observed that organizations benefit most from pursuing a strategic stakeholder orientation in a VUCA (volatile,

uncertain, complex, and ambiguous) environment. Partnering with Walden University to engage me as a scholar-consultant, I explored the strategies board members of the nonprofit used to recruit and retain members through the dual frameworks of stakeholder theory and the BEF. Nonprofit leaders must continue reinventing their organizations with a focus on positively impacting their members.

I partnered with a nonprofit organization in eastern Canada for this study using Freeman's (1984) stakeholder theory as the conceptual framework. I also used the 2021–2022 BEF to examine the nonprofit's organizational environment (i.e., organizational relationships and situation); leadership; strategy; customer; workforce; operations; and measurement analysis, and knowledge management. I gathered data from semistructured interviews, archival documents, publicly available information, academic literature, and regular communication with three board members.

Board members and leaders of nonprofit organizations can use the findings from this qualitative single case study to identify strategies to recruit and retain members, refine their strategic focus, and produce social change that can benefit their communities. Leaders of nonprofit organizations can use the BEF to examine the effectiveness of their organization, improve their results, and deliver a more significant impact for their stakeholders. Nonprofit leaders implementing a continuous improvement approach for their organization might increase the organization's opportunity to sustain its operations.

Contributions and Recommendations

Nonprofit leaders must balance numerous internal and external stakeholder demands. Compared to for-profit companies, nonprofits are more complex, operate in a

challenging multistakeholder environment, and, most critically, their value lies in achieving social value rather than profit (Sanderse et al., 2020). Organizational leaders need to be adept at managing these multiple claims. Freeman and Reed (1983) stated that the nonprofit board of directors is responsible for assessing each stakeholder group's power and organizational stake. This study's results can provide business leaders with strategies to recruit and retain members to improve the organization's access to a recurring revenue source, volunteers, and a source of meaningful customer insights. Nonprofits offering members a sense of belonging and prestige are more inclined to renew their membership (Pressgrove et al., 2022), and nonprofits with a dialogic connection to their membership base may develop policy views that are in alignment with members or broader society (Heylen et al., 2020).

Nonprofit leaders can also benefit from applying critical questions from the Baldrige excellence framework to its ongoing operations to help develop an organization focused on excellence and sustainability. Parast and Safari (2022) noted that the BEF was an effective, holistic, valid, and reliable tool to improve a small business's performance outcomes and competitiveness, leading to improved business sustainability and performance. Nonprofit leaders can utilize BEF's questions to achieve their mission, improve sustainability, and lead to a high-performance organization.

Declining membership was a symptom of the client nonprofits underlying business problem—an outdated mission and strategy. During discovery sessions with board members and the semistructured interviews, it was clear that the membership value proposition was no longer compelling, nor was the organization's mission relevant to

CAF pensioners. I recommend that organizational leaders identify a new mission to meet unmet or underserved veteran needs and implement systematic approaches for listening to stakeholders, developing new products and services, monitoring the competitive environment, strategic and action planning, and performance management. Creating and delivering compelling products and services can engage more stakeholders, improve brand recognition, and increase membership.

I recommend that academics and future researchers explore how leaders in nonadvocacy nonprofits use stakeholder theory to increase their membership and support their mission. Nonprofits that deliver products or services may provide researchers with an alternative view of critical stakeholders not focused on influencing government policy. Using the BEF, a mixed-methods approach may provide small nonprofit leaders with actionable data to improve their ability to recruit and retain members and other stakeholders that support their mission. This case study focused on a Canadian nonprofit. Future research could extend it to other countries, providing increased visibility into the stakeholder and membership challenges and opportunities inherent in different political and regulatory environments. Finally, I suggest future researchers use the multiple case study method to validate the effectiveness of the membership recruitment and retention strategies in Canada.

Application to Professional Practice

The doctoral study findings contribute to membership acquisition strategies that support the achievement of the nonprofit's mission. Membership is significant to organizations (Grothe-Hammer, 2020), and nonprofit organizations can help improve

member-nonprofit relationships by providing a portfolio of appealing programs (Fang et al., 2020). Leaders of nonprofit organizations face challenges with increasing membership and require compelling missions and services supported by a cost-effective membership program providing members with opportunities to influence the nonprofit's services, volunteer, and advocate on their behalf. Grothe-Hammer and La Cour (2020) found that members of an organization agree to its expectations as long as the benefits outweigh the costs, and Heylen et al. (2020) noted that as members increase their ability to influence the direction of the nonprofit, the likelihood of detachment decreases. Stakeholders associating themselves and supporting a nonprofit with their funds and time must believe that the organization makes a difference and that their support is beneficial.

Nonprofit leaders identifying and implementing compelling products, services, and membership programs gain insights into beneficiary concerns and committed volunteers supporting advocacy and delivery of other services that enhance the organization's brand and long-term sustainability. Rottkamp (2021) found that the nonprofit's ability to meet its customers and community's needs impacts its sustainability. Nonprofit leaders experiencing declines in membership can utilize this study's findings and recommendations to evaluate their mission, determine the effectiveness of their products and services, improve their membership value proposition, and chart a new path toward longer-term sustainability.

Implications for Social Change

The results of this study might contribute to positive social change by providing nonprofit leaders with strategies to increase membership in their organizations that

provide consistent revenue, a cadre of potential volunteers, and insights into their relevant concerns. Membership helps establish a community of like-minded people to promote the organization's mission with friends, families, and other stakeholders in their networks. Also, as a nonprofit increases its reach and impact, organizational leaders may hire or increase its staff to support the mission and benefit the local community.

Implementing a comprehensive and compelling membership program helps the organization sustain its veteran-focused activities and increase its sustainability. The increased funding and insights provided by the veteran and other stakeholders provide the nonprofit's leaders with insights into current gaps with CAF pensions, medical pensions, and other veteran-experienced concerns. Senior leaders can expand their services to provide veterans with solutions to mitigate their concerns and improve their quality of life.

Recommendations for Action

The purpose of the qualitative single case study was to explore some nonprofit board members' strategies to increase membership to achieve their organization's sustainability objectives effectively. The study findings and results included four key themes, (a) marketing reach, (b) membership value proposition, (c) nonprofit strategy and mission, and (d) board governance that describes a strategic approach with its members, the BEF examination process and results strengths and opportunities for improvement. The study's findings, recommendations, and contributions answer the research question and provide the nonprofit board of directors with tangible actions to increase membership while reinventing the organization's mission and vision.

Integrating the study findings, key themes, BEF examination results, strengths, and opportunities for improvement, I recommend that the nonprofit's board of directors pursue the activities described sequentially in Table 17.

Table 17*Recommendations*

Step	Activity	Benefit
1	Market Segment The board of directors should confirm that veterans are the target market segment.	The market includes pensioners, medical discharges, and veterans separated without a pension. The expanded market provides opportunities beyond CAF pensions.
2	Market Research Approach Select the approach to identify veteran concerns. Options include partnering with a research company, contracting with an independent market researcher, or pursuing internally.	Board members will understand the cost, effort, and timeline for determining veterans' concerns with pensions (i.e., CAF and medical), separation, or benefit access.
3	Customer Insights Inputs include email and online surveys to veterans using a purchased list, focus groups to refine email and online survey results, the Prime Minister's letter, and conversations with stakeholders (e.g., veteran-focused nonprofits, partners, personal networks, VAC, and members of parliament).	The nonprofit has a list of unresolved veterans' concerns. The key initiatives defined in the Minister of Veterans Affairs and Associate Minister of National Defence Mandate Letter (Rt. Honorable Justin Trudeau, P.C., M.P., 2021) are mapped to the prospective products and services. ¹
4	Products and Services Define a slate of potential products and services that help resolve veterans' unresolved concerns. For each product or service, determine the resources (e.g., people, competencies, funds) needed to deliver each.	The organization identifies products and services that can improve veterans' lives. Resources required to launch these new products and services are specified.
5	Competitive Environment Survey the market for organizations providing the competing products and services identified in step 4. Define the relative market share and effectiveness of the competitive organization's offerings. Identify best-in-class membership programs and benefits. Inventory membership benefits and costs provided by nonprofits serving the veteran community.	Each potential product or service includes a list of competitive organizations offering similar products and services. Descriptions are provided for the best-in-class membership programs. A list of benefits offered by nonprofits serving veterans is specified.
6	Stakeholder Analysis List the essential stakeholders needed to launch each potential product or service. Define each stakeholder group's core competencies, role in launching the new products or services, and propensity for partnering.	The critical stakeholder groups and their salience for the potential products and services are defined. Mapping of stakeholder groups to potential products and services completed. Synergies across stakeholder groups are defined.
7	Internal Capabilities Assess and list board competencies and skills.	The research defines the nonprofit workforce's (i.e., board of directors) core competencies. Enables the potential gap in skills needed to launch new products and services.

(table continues)

Table 17 cont.*Recommendations*

Step	Activity	Benefit
8	Strategic Planning Refine the nonprofit's mission, vision, and values. Finalize the slate of new products and services. Define the difference between the new competencies required and board member competencies. Identify stakeholders, their capabilities, and their role in launching new products and services. Determine board members' and workforce needs. Develop membership criteria and pricing options (e.g., all veterans, nonveterans, Canadian citizens only; single, partner, family pricing) Develop strategic initiatives and goals.	New mission, vision, and values create the cornerstone for transforming the organization. Final products and services selected and aligned with appropriate goals (e.g., increase membership by 25% annually). Resource requirements (e.g., partners, capabilities, funding) defined for the new products and services. Draft membership program benefits, requirements, and pricing established
9	Establish action plans Create action plans for key initiatives (e.g., membership program, stakeholder communication, competency development, board of directors' needs).	Action plans, with accountable owners and timelines, are created supporting the achievement of strategic initiatives. A stakeholder communication plan and editorial calendar are created.
10	Monitor performance The board of directors monitors the progress of action plans monthly or quarterly.	Board members see progress toward accomplishing objectives. Leaders can modify the plans on a timely basis from the results provided.
11	Track Results Establish a performance management system to track the results corresponding to the organization's vital processes (e.g., potential areas include membership, action plan achievement, stakeholder communications, revenue by product or service, profit, key governance activities, and performance reviews).	Board members can access the vital operational and strategic results necessary to effectively manage the nonprofit and deliver their products and services.
12	Governance Establish monthly or quarterly board meetings to review action plan progress. Implement board governance written acknowledgments such as a signed Code of Ethical Conduct and Conflicts of Interest policies. Improve the archiving of critical work products to the nonprofit's cloud server.	Launching a new service and rebranding the organization requires a more hands-on approach to managing stakeholder relationships, evaluating progress, and making necessary adjustments. The signed documents improve the transparency of the governance board. Critical governance and operational documents are backed up and quickly retrievable by board members

Note: ¹ For example, continue reducing wait times and ensuring veterans and their families receive decisions on applications promptly; launch a veterans employment strategy to ensure all veterans find meaningful work on release from the CAF; continue simplifying processes, improve service delivery, and strengthen transition services; and ensure CAF members and veterans have access to adequate mental health resources, services, and training programs.

Fuertes et al. (2020) noted that strategists can use an integrated three-stage framework for strategic decision-making:

1. Stage 1 gathers the essential information to develop and prioritize strategic actions.
2. Stage 2 focuses on aligning internal and external factors to develop viable alternative strategies.
3. Stage 3 completes the Quantitative Strategic Planning Matrix to determine the strategic position.

Nonprofit leaders can use these steps to update their mission and vision, develop new products and services supporting the veteran community, reinvent the organization, and communicate its new mission and vision to their stakeholders.

Recommendations for Further Research

I explored the membership acquisition and retention experiences of one nonprofit organization from eastern Canada. The four board members interviewed provided their understanding of membership practices used during the last 20 years and associated results. Future researchers should consider using a multiple case study design to determine strategies leaders use to increase membership in an advocacy-based nonprofit supporting changes in government policies. Researchers use multiple designs to study two or more cases in the same study and determine cross-case conclusions and comparisons (Pathiranage et al., 2020). Researchers using a multiple-case study design gain a broader understanding of the strategies leaders of nonprofit organizations use to

recruit and retain members. Another limitation is that I did not obtain experiences from leaders of other Canadian nonprofit organizations.

This qualitative single case study relied upon the experience of the four board members familiar with the nonprofit's membership strategies. Furthermore, the geographical distance between me and the nonprofit organization precluded the opportunity to conduct the interviews in person. Future researchers should consider increasing the number of semistructured interviews and maximizing face-to-face opportunities. Meeting in-person provides the interviewer (a) with improved opportunities to observe the interviewee, (2) more choice in the selection of an optimal interview location free of distractions, and (3) minimizes concerns with the internet and other technical problems.

Future researchers should consider a quantitative or mixed methods study that may enable an empirical assessment of the data, strengthening the study's findings. Extending the research to membership-based nonprofits offering products and services and nonprofits in other Canadian provinces may also provide a deeper understanding of the findings, given the preponderance of U.S.-based literature. Finally, including nonprofit organizations that manage their support processes internally instead of an association management partner may provide leaders with more insights into stakeholder management. Expanding research from a qualitative single-case study to include other Canada-based nonprofits, conducting a multiple case study approach, conducting in-person semistructured interviews, or pursuing a quantitative or mixed methods study may

give researchers, organizational leaders, and practitioners more strategies for increasing membership.

Reflections

I expected this doctoral program to be similar in effort to my MBA—and I was grossly mistaken. Balancing the course requirements with my other activities was infinitely more difficult than I envisioned. However, the research process was more rewarding than I expected, and working with my Canadian nonprofit was enjoyable. From selecting stakeholder theory at the outset, after reviewing dozens of others, I learned it has applicability beyond my case study to business in general. My experience with the BEF is extensive, which accelerated my examination of the organization and collection of the data—it was one less thing I needed to learn on this journey. But documenting how the organization completes its critical processes differed from just providing feedback, causing me to reassess the applicability of the framework.

My ability to research, review, and identify salient points from academic research articles opened an entirely new venue for learning and supporting my ideas in the workplace. I found myself retrieving articles on a wide variety of topics as I sought best practices to bring forward new methods of working in my paid employment. Entering the program required a reprioritization of my time and a laser focus on completing the work while remaining productive at work and maintaining minimal contact with friends and family. Near the end of the program, I got tired of the research, the writing, and the constant editing to communicate the research findings and recommendations clearly. I understand this is a familiar feeling that many students face.

The rewards from pursuing this doctoral journey were many. First, it completed a dream I articulated 30 years ago to attain a doctorate. Second, the education process made me a much better writer, able to communicate succinct thoughts in fewer words. Third, I met a wonderful group of client board members with whom we had fun together on the many hours of calls, emails, and texts. The board members were open-minded, thoughtful, and flexible with their schedules, enabling an open dialogue during the research project. Also, their willingness to quickly review in-process materials and add frank comments improved my understanding of the organization and its objectives. Last, the insights I gained through Walden University's consulting capstone DBA program gave me an appreciation for the doctoral research process and the importance of building relationships that engender unfettered access to organizational information. Doctoral-level scholar-consultants provide value to client organizations through rigorous research, including developing and following a proven approach for evaluating the client organization. With complete analysis, providing the client leaders with practical recommendations to improve their organization's impact was the final and most rewarding step.

Conclusion

The objective of my research was to identify and recommend meaningful strategies nonprofit leaders can use to improve the nonprofit's ability to increase their membership. The research shows nonprofit leaders improve membership by extending their strategy and mission to serve veterans beyond CAF pensioners. The board of directors primarily relies upon information gained from their members to help inform them of

their objectives, followed by consistent revenue. Increasing its membership base gives the nonprofit better insights into veteran issues, a larger pool of potential volunteers, and increased gravitas when approaching government and MSIN stakeholders.

For nonprofit leaders to sustain a robust membership program now and in the future, they must continually evaluate the environment, ensuring that the mission and services provided still meet its stakeholder's and beneficiaries' needs. To improve organizational sustainability, leaders should focus on updating their mission and vision and launching new products and services that give potential members and other stakeholders a compelling reason to support the organization. I developed my findings, results, and recommendations by synthesizing academic and professional literature, semistructured interviews, the BEP examination, and archival data research. The thematic analysis revealed that nonprofit leaders with compelling missions, products, and services that solve beneficiary needs can improve membership and achieve long-term organizational sustainability.

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Appendix A: Interview Protocol

Date:

Time:

Participant:

Researcher:

Introduction:

My name is _____. The goal of this research project is to discover the membership strategies that facilitate ongoing organizational success. I will use the information from this interview to identify successful membership strategies that leaders of small nonprofit organizations can use to expand their organizational mission, improve community services, and catalyze organizational success.

Before this interview, I emailed you a copy of the consent form, which you returned electronically. The interviews will take approximately 30-45 minutes and will follow a semistructured format. I will record the interview, first noting the date and time, and for anonymity, I will identify you as Participant (Participant 1, Participant 2, Participant 3, Participant 4) when coding the transcript (PO1, PO2, PO3, P04). You have the right to withdraw from the research project at any time by expressing your intent either verbally or electronically. Do you have any questions or concerns you would like to share with me? If there are no other questions, we can get started.

Turn on the voice recorder.

Central Research Question: What strategies do some nonprofit leaders use to increase membership in a Canadian nonprofit protecting rights and benefits of retired military?

1. Do you have any concerns regarding the topic?

Introduction Questions:

1. When did you start working with the nonprofit organization?
2. What is your role?
3. Why do you want the nonprofit organization to be successful?

Interview Questions:

1. What strategies do you use to increase membership in the organization?
2. What are some of the challenges encountered in getting new members?
3. What are some of the challenges encountered with renewing members?
4. What new market segments have you selected for growing membership with other affiliated pensioner groups?
5. How have you addressed the challenges encountered with the growth of members?
6. How do you assess the effectiveness of member acquisition and retention strategies?
7. What is the membership value proposition offered to members?
8. Based on your experience, how effective were the previous strategies?
9. What other strategies would you include or exclude to increase membership?

Thank you for the time today. I will provide you a copy of the transcript, including all questions and concerns for your review following the interview. If there are any concerns or additional information you feel pertains to the discussion, please feel free to reach me at [REDACTED]. Have a wonderful day.

Appendix B: Advocacy Definitions

Zhang and Guo (2020) studied the causal factors leading to effective advocacy. They noted that nonprofit advocacy effectiveness is dependent on (1) an organization's resources (internal approach), (2) close relationships with the government (external approach), and (3) a combination of insider and outsider tactics (strategic). Further, they defined 11 advocacy tactics categorized as insider (working directly with policymakers) and outsider (working with others to influence policymakers). Zhang and Guo added social media advocacy as a separate marketing activity, given the increased use of Facebook, YouTube, Twitter, or other platforms—resulting in 12 tactics.

Insider Advocacy

1. Direct lobbying seeks to influence legislation by persuading government officials to support a particular position, typically through direct communication with Members of Parliament or Ministers.
2. Judicial advocacy seeks to effect change through the legal system.
3. Administrative activities include, amongst others, influencing policymakers through meetings or commenting on their rulemaking.
4. Expert testimony is delivering domain-specific expertise or advice at legislative body hearings upon their request.

Outsider Advocacy

1. Research is developing original topical analysis and documents specific to legislation, policy, or broad social or political problem.

2. Media engagement pursues policy change through traditional media outlets (e.g., press releases, media events, letters to the editor) and building relationships with members of the press.
3. Social media marketing seeks policy change through its social media platforms (e.g., Facebook, LinkedIn, Twitter, YouTube) to communicate with stakeholders.
4. Grassroots lobbying mobilizes public stakeholders to show their support for or against specific legislation or policy.
5. Public events and direct action are like grassroots efforts and organizes demonstrations and other visible public actions.
6. Public education provides stakeholders with information that educates them regarding public policy issues.
7. Coalition building works for policy change through coalitions of multistakeholder issue networks that might include other advocacy and lobbying groups.
8. Electioneering seeks to influence the outcome of an election by mobilizing supporters to vote in a certain way or endorsing or supporting a candidate or political party.