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Some Nonprofit Leaders Lack Strategies to Support Financial Change Management in an Organization for Sustainability

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Walden University
2024

Abstract

Some Nonprofit Leaders Lack Strategies to Support Financial Change Management

in an Organization for Sustainability

by

Ebony S. Billups

MS, Belhaven University, 2020

BS, University of Southern Mississippi, 2017

Consulting Capstone Study Submitted in Partial Fulfillment

of the Requirements for the Degree of

Doctor of Business Administration

Walden University

February 2024

Abstract

Some nonprofit leaders lack strategies for financial change management, resulting in long-term organizational health and sustainability challenges. Grounded in general systems theory, the purpose of this qualitative meta-analysis was to explore strategies that nonprofit organization leaders use to support financial change management in an organization for sustainability. Data were gathered through six previously approved Walden University doctoral studies that shared a thematic focus on sustainability and long-term organizational health through financial change management. Thematic analysis was used to analyze the data. The key themes that emerged were robust communication and stakeholder engagement, mission alignment and dedication, and the embodiment of a continuous improvement and learning culture within these organizations. A key recommendation is for nonprofit leaders to implement strategic planning methodologies and robust analytical frameworks to promote continuous improvement. The implications for positive social change include the potential for nonprofit leaders to create a competitive advantage, optimize available resources, promote sustainability, and expand growth.

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Dedication

To my future husband and our yet-to-be-born children, as I embark on this academic journey, I carry immense gratitude for the unwavering love and support that I know will grace our lives together. Though our paths haven't crossed yet, I anticipate drawing the strength and inspiration from your presence. To our future children, yet to bless our lives, I aspire to inspire you through my quest for knowledge and growth.

Acknowledgments

I am eternally grateful to my God, my everything, for steadfastly guiding my steps and fortifying my faith. Your presence has been my pillar of strength, standing by me through the highs and lows of this pursuit. Your unwavering support has enriched every moment, shining brightly even during the darkest times.

To my beloved parents, family, friends, and cherished church community, your unwavering support, endless encouragement, and boundless love have been the guiding lights throughout this journey. Your belief in me propelled me forward when doubt lingered, and for that, I am endlessly thankful.

To Dr. Wentz, my chair; Dr. Anthony, my second committee member; Dr. Miles, my program director; and the Research Ethics and Compliance Department, thank you all for your unwavering support, guidance, and invaluable contributions. Your patience, feedback, mentorship, and understanding have been instrumental in navigating this academic journey, and your support has been pivotal in achieving this milestone.

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Section 1: Foundation of the Study

In this section, I will frame the business problem and purpose statement. I will discuss the case population and the nature of this study. The outline for the methodology I used will identify and explore effective strategies that leaders in nonprofits use to maintain long-term organizational and financial health. The intent of this study was to focus on nonprofit leaders who lack strategies to support financial change management in an organization for sustainability. In accordance with the Walden University Consulting Capstone Doctor of Business Administration (DBA) program guidelines, I assumed the role of a researcher to conduct a meta-analysis study utilizing previous scholarly papers from Walden University.

Background of the Problem

The Internal Revenue Service (IRS) provides a financial perspective for 1.5 million registered and 12 million employed nonprofits (Molk & Sokol, 2021). Losing financial change management and sustainability for a nonprofit organization disrupts the organization's functioning, service delivery, and administration for supporting programs and services for the public good (Andrew et al., 2020). When nonprofit leaders struggle to identify effective strategies to maintain long-term organizational and financial health, the nonprofit becomes even more critical to provide for those in need. However, the funding streams to support activities may be even more stressed (Johnson et al., 2020). Some nonprofit leaders lack strategies to support financial change management in an organization for sustainability. The diversification of revenue that nonprofits receive

creates a cushion strategy to battle against financial instability and uncertainty in nonprofits (Hung & Hager, 2019).

The purpose of the background is to introduce the problem that some nonprofit leaders have limited information on the effect of long-term organizational health with financial change management and sustainability for success. In this study, my intent was to identify and explore effective strategies to support financial change management in an organization for sustainability. By understanding the developed effective strategies used by leaders of a nonprofit organization, nonprofit organizations may achieve long-term organizational health through financial change management.

Problem Statement

Disruption from financial management and sustainability with earned income, government funding, charitable donations, and investment incomes can create malfunctions with service delivery and organization competencies with program and service support for the public (Johnson et al., 2020). From a financial perspective, the IRS provides data for 1.5 million registered and 12 million employed nonprofits, which collectively account for 5.6% of the U.S. gross domestic profit (Molk & Sokol, 2021). The general business problem was that organizations lose sustainability and success due to lack of financial change management. The specific business problem was that some nonprofit leaders lack strategies to support financial change management in an organization for sustainability.

Purpose Statement

The purpose of this qualitative meta-analysis study was to explore strategies nonprofit organization leaders use to support financial change management in an organization for sustainability. The population for this study comprised of six previously published Walden University doctoral studies that focused on the need for effective strategies to maintain long-term organizational and financial health in the United States. Utilizing the technique of meta-analysis, this study involved systematically reviewing and synthesizing the findings of multiple independent studies on the topic. The study may contribute to positive social change by promoting and facilitating long-term organizational health within emerging markets. Nonprofits and small business owners could gain practical insights from this study's findings to create a competitive advantage, optimize available resources, promote sustainability, and expand growth. When nonprofit leaders utilize long-term organizational health with effective financial change management strategies, then the community stakeholders benefit through improved services.

Nature of the Study

In this study, I opted for a qualitative research method to investigate the successful strategies and processes employed by nonprofit leaders in maintaining long-term organizational and financial health. Qualitative research was chosen due to its suitability for exploring experiences and motivations, aligning with the study's focus on understanding the underlying factors contributing to success (Almalki, 2016; Yin, 2018). While alternative methods such as quantitative research or mixed methods were

available, they were not considered ideal for this study as they might not provide the in-depth insights required for a comprehensive understanding of nonprofit leaders' strategies.

Regarding the research design, I specifically selected a meta-analysis study design as the most suitable approach for this research. Meta-analysis was chosen because it offered the means to create a foundation for socially constructed meaning, which was essential for addressing the study's purpose effectively (Almalki, 2016). While other design options such as single case studies or multiple-case studies were contemplated, they were not selected because they might not have provided the comprehensive synthesis of existing research that the meta-analysis approach offers. The meta-analysis approach enables a broader and more generalizable perspective, allowing for a more comprehensive exploration of the subject matter (Yin, 2018).

Research Question

What strategies do nonprofit leaders use to support financial change management in an organization for sustainability?

Meta-Analysis Guiding Questions

1. How do you determine which strategy or strategies to consider for maintaining long-term organizational and financial health?

2. How do you design and implement strategies to maintain long-term organizational and financial health?

3. What strategies have you used in the past for financial management?

4. How do you identify financial opportunities?

5. What performance goal did you develop to maintain long-term organizational and financial health?

6. How do leaders use performance indicators to evaluate the effectiveness of your strategies for maintaining long-term organizational and financial health?

7. How do organizational leaders engage financial change management for maintaining long-term organizational and financial health?

8. Based on the organizational experiences, what are the key issues that were addressed that likely contributed to the ongoing sustainability of business?

9. What additional elements, comments, or information does the organization present regarding maintaining long-term organizational and financial health?

Conceptual Framework

The logical connections between the framework presented and the nature of my study include general systems theory (GST) to serve as the conceptual framework to identify and understand the strategies for addressing the specific business problem. Von Bertalanffy (1950) introduced GST in the late 1920s. GST consists of three main constructs: system science, technology, and philosophy. GST constructs involve a holistic doctrine. Researchers have discussed the relationship between the empirical word based on the nature of reality and knowledge (Laszlo, 1978). The GST conceptual framework applied to my study because the framework argument was expected to facilitate an understanding of how successful leaders in nonprofit organizations sustain themselves in environments with the insecurity of critical resources. GST was useful for identifying and understanding the findings of my research study.

Operational Definitions

Baldrige Performance Excellence Framework: The Baldrige Performance Excellence Framework is a holistic approach that senior leaders used to address systems-based perspectives for management and leadership systems. Senior leaders used expectations and engagement; information and knowledge management; operational systems-based perspective to address practices for high performance with leadership and organizational governance; strategy-driven performance; customers and workplace expectations and engagement; information and knowledge management; operational effectiveness; societal responsibility; and results of long-term organizational sustainability (Baldrige Performance Excellence Framework, 2018).

Financial health: Financial health for a nonprofit can be measured by two categories: financial capacity and financial sustainability. Both categories can describe the state of nonprofit personal affairs with obtaining and maintaining opportunities and resources (Hung & Hager, 2019).

Long-term organizational: Long-term organizational is a strategical process that leadership uses to shape organizational culture by creating an intangible asset and driver of competitiveness with sustainability (Streimikiene et al., 2021).

Assumptions, Limitations, and Delimitations

Assumptions

Assumptions are unverified facts that entail a degree of risk, although they may hold truth (Marshall & Rossman, 2016). In the context of this study, three assumptions were made. First, it was assumed that the Walden University studies utilized in this meta-

analysis study would demonstrate transparency and accuracy applicable to the research question. Second, it was assumed that the Baldrige Performance Excellence Framework for 2017–2018 would serve as a practical reference for summarizing the findings of my meta-analysis. Lastly, it was assumed that the outcomes of my study would offer nonprofit leaders' strategies to foster long-term organizational and financial health.

Limitations

Limitations refer to any potential weaknesses of a particular study that are usually out of the researcher's control and are associated closely with the chosen research design, statistical model, funding constraints, and other factors (Theofanidis & Fountouki, 2018). One primary limitation of this study was the utilization of a multistudy approach, which necessitates ensuring the validity and reliability of data collection and analysis across multiple studies. Another limitation pertained to the risk of publication bias, meaning that studies with significant or positive findings are more likely to be published, while those with negative or nonsignificant results may remain unpublished. Additionally, a limitation arose from the potential introduction of selection bias due to my choice of cases that align with my hypotheses or theories. Lastly, a limitation emerged from the absence of a direct comparison between data from the multiple previously published Walden University studies.

Delimitations

Delimitations encompass the boundaries or scope of a study (Bailey, 2018). The scope of this qualitative meta-analysis study entailed a synthesis and analysis of existing research studies on a specific topic. Furthermore, I delimited the study's scope to focus

exclusively on the strategies nonprofit leaders use to support financial change management in an organization for sustainability. Additionally, I included previously approved Walden University studies, allowing for the amalgamation and analysis of results to derive more generalizable conclusions or to unveil patterns, trends, and associations that might not be evident in any single study. The study's parameters encompassed successful leaders within nonprofit organizations navigating resource-uncertain environments to sustain their operations.

Significance of the Study

Contribution to Business Practice

My envisioned study's findings were significant in that the results provided new insights regarding strategies nonprofit leaders use to optimize long-term organizational health using financial change management. Nonprofits and small business owners could gain practical insights from this study's outcomes to create a competitive advantage, optimize available resources, promote sustainability, and expand growth.

Implications for Social Change

The results from the study may contribute to general positive social change by promoting and facilitating long-term organizational health within emerging markets. When nonprofit leaders utilize long-term organizational health with effective financial change management strategies, then the community stakeholders benefit through improved care services.

A Review of the Professional and Academic Literature

In this qualitative meta-analysis study, I explored strategies nonprofit organization leaders use to support financial change management in an organization for sustainability. My problem statement, purpose statement, central research question, and conceptual framework formed the underpinnings that set the foundation for this review of professional and academic literature. The research question for this study was the following: What strategies do nonprofit leaders use to support financial change management in an organization for sustainability? I used Walden University's library database and Google Scholar to locate relevant articles for this literature review. Databases used in alphabetical order (and not order of precedence) included ABI/INFORM, Academic Search Complete, Business Source Complete, EBSCOHost, Emerald Management, ProQuest, PsycArticles, SAGE, SAGE Journals, and Science Direct. The review of the literature includes articles gathered using the following key search terms: *general systems theory, strategies, sustainability, sustain, financial management, organizational health, financial health, nonprofits, small businesses, revenue, success, long-term health, optimizing resources, grants, government funding, charitable donations, profits, business success, business challenges, regulatory environment, compliance, marketing, advertising, succession, workforce, governance, financial change management*, and *organizations' disruptive*. Walden's Doctor of Business Administration (DBA) program requires an exhaustive review of available literature with the majority of sources referenced having a date of publication within 5 years of the expected completion of the study. Within the literature review, 127 sources

were referenced, with 55.1% (70 sources) classified as recent publications spanning the years 2018 to 2023. Among peer-reviewed articles, 58% (61 out of 105) were published within the preceding 5 years. The entirety of the sampled dissertations (5 out of 6) demonstrated temporal relevance, being published within the same 5-year period, constituting 83.3%. In the case of online resources, 81.80% (9 out of 11) were within the 5-year timeframe. However, only 33.3% of the examined books (3 out of 9) fell within the specified 5-year publication span.

I explored long-term organizational and financial strategies to understand the decisions nonprofit leaders need to implement for sustainability for financial change management. The review of the literature includes the GST as the conceptual framework to provide valuable information for leaders of nonprofits to observe and, if desired, implement for long-term organizational and financial health. GST guides contribute to the comprehension of the parameters that encapsulate effective leadership within nonprofit organizations, as leaders navigate resource-uncertain environments to ensure the continuity of their operations. Supplementing the conceptual framework of GST, I delve into alternative frameworks pertinent to small businesses, nonprofits, and strategic leadership. I emphasize the significance and nuances surrounding small businesses, nonprofit entities, leadership strategies, strategic planning, measurement, analysis, as well as knowledge management practices. Furthermore, my literature review delves into the critical aspects of nonprofit reliance on funding, examining the challenges inherent in funding mechanisms. These comprehensive discussions serve to enrich the understanding of leaders in nonprofit sectors, aiding them in navigating resource-uncertain

environments. Through such insights, I aim to foster the sustained operations and enduring financial health of nonprofit organizations.

General System Theory

I will explore the utilization and significance of GST in this qualitative meta-analysis study, exploring its origins, applications, and influence on diverse fields, including business and sustainability. The framework for this qualitative meta-analysis study rested upon GST, introduced by Von Bertalanffy in the late 1920s (Caws, 2015; Von Bertalanffy, 1950, 1953). GST, often referred to as *system theory*, emphasizes understanding the interactions and dynamics of complex systems, extending beyond biology and physics (Von Bertalanffy, 1968). Its application has evolved across fields, such as business and sustainability, demonstrating its versatility (Kantabutra, 2022; Nurmi et al., 2019).

GST's core concept is rooted in understanding the interrelationships and contributions of individual components to an entire system (Von Bertalanffy, 1950, 1953). Bridging the gap between biology and physics, Von Bertalanffy sought to establish systematic approaches applicable to various disciplines (Von Bertalanffy, 1953). The theory's adaptability is evident through its influence on areas such as business, sustainability, and organizational culture (Kantabutra, 2022; Nurmi et al., 2019). For nonprofit leaders, GST offers insights into maintaining sustainability and achieving organizational success through interconnected systems (Von Bertalanffy, 1972).

The GST, with its origins in understanding complex relationships, provided a valuable framework for this meta-analysis, enabling exploration of interdependencies and

interactions within nonprofit organizations (Caws, 2015; Von Bertalanffy, 1950, 1953). Its broad applicability across disciplines, from business to sustainability, highlights the theory's versatility (Kantabutra, 2022; Nurmi et al., 2019). GST's lens on interconnectivity aligns with the nonprofit sector's need for sustainable and well-coordinated systems (Von Bertalanffy, 1972). In essence, GST offers a comprehensive approach for leaders to understand and manage complex systems within nonprofits, promoting organizational health and effectiveness (Kast & Rosenzweig, 1972).

Alternatives to GST

Alternative theories to GST offer diverse perspectives for understanding and managing organizational dynamics, including the plan-do-study-act (PDSA) model, resource dependency theory (RDT), and pecking order theory. The PDSA model, often employed in healthcare and for-profit sectors, serves as a quality improvement tool (Prybutok, 2018). While valuable in enhancing healthcare and direct change management, PDSA is less common in nonprofit health environments (Donnelly & Kirk, 2015). RDT focuses on reducing uncertainties by managing external stakeholder relationships and an organization's dependence on external resources (Raffo et al., 2016; Schatteman & Bingle, 2017). Another alternative, pecking order theory, prioritizes organizational finance with an asymmetric foundation for funding sources (Bhama et al., 2018). It offers a hierarchy of financing sources and guides decision-making between internal and external finances (Martinez et al., 2019).

PDSA's application in healthcare and its emphasis on continuous improvement align with enhancing organizational processes (Prybutok, 2018). RDT is particularly

relevant for nonprofits reliant on external funding, given potential economic fluctuations (Suárez & Hwang, 2013). Pecking order theory, originating from the study of small businesses, offers insights into financial decision-making (Chen, 2015; Lee et al., 2016). These alternative theories, PDSA, RDT, and pecking order theory, provide distinctive lenses through which to view and manage organizational dynamics (Bhama et al., 2018; Prybutok, 2018; Raffo et al., 2016). While PDSA may not be common in nonprofit health environments, RDT's focus on resource dependence resonates with nonprofit challenges (Suárez & Hwang, 2013). Pecking order theory, rooted in a small business context, offers insights for financial strategies and expansion (Chen, 2015; Martinez et al., 2019). These alternatives showcase the versatility of approaches beyond GST, catering to specific organizational needs.

Small Business

The pivotal role of small businesses in the U.S. economy encompasses their historical context, significance, and contribution to economic development. The historical foundation of supporting small businesses traces back to western Europe, with significant implications for the United States (Greenspan & Wooldridge, 2018). Defined as having fewer than 500 active employees, small businesses play a vital role in the U.S. economy, representing 99% of firms and 50% of employment (Small Business Administration [SBA], 2018; Warren & Szostek, 2017). Their substantial impact is highlighted by their employment of 56.8 million workers, accounting for 99.7% of all businesses (SBA, 2016).

Small businesses, whether for-profit or not-for-profit, are remarkably diverse and adaptable across various industries and missions. Owners are often motivated by autonomy and increased income (SBA, 2022). Small businesses contribute significantly to economic development through job creation and innovation (Campbell & Park, 2017). Historical support for small businesses has shaped their substantial impact on job creation, economic development, and modernization (Campbell & Park, 2017; Greenspan & Wooldridge, 2018; SBA, 2018). Small businesses are crucial for sustaining communities and promoting economic diversity, especially during challenging times (Campbell & Park, 2017). The evidence highlights the multifaceted role that small businesses play in the economy, emphasizing their significance in terms of job creation, innovation, and community support. As leaders navigate the complexities of income generation and operational achievements, small businesses remain integral to the broader economic landscape, making them indispensable elements in the economic fabric.

Nonprofits

Nonprofit organizations have transformed in their societal role and significantly impact society in terms of contributions, scale, and operational challenges. Nonprofits not only contribute to societal well-being and mission fulfillment, but also enhance nonprofit's managerial capabilities (Lyons, 2020; Stecker, 2014). They constitute a substantial portion of the U.S. economy, employing millions and contributing to the GDP (Molk & Sokol, 2021; Wang, 2022). However, nonprofits face operational challenges while continuously seeking opportunities for development. Researchers have found that nonprofits have evolved and play a multifaceted role in society, not limited to charity.

Their adaptability is crucial in the face of dynamic challenges. Recognizing these transformations and challenges is fundamental to understanding the significance and complexities of nonprofit organizations. Moving forward, I will explore the tax treatment of nonprofits and their engagement in commercial activities as part of their mission, highlighting the need for adaptability in ever-changing environments (McMillan, 2020; Moeller & Valentinov, 2012). This deeper exploration will provide insight into the organization culture, shedding light on its underlying values, norms, and dynamics with regard to sustainability, success, branding, successful branding, and failure.

Organizational Culture

Organizational culture is a multifaceted and profound concept that significantly impacts various sectors, including nonprofit organizations and healthcare. Researchers have delved into the intricate dynamics involving organizational culture and leadership and have designed tools within these critical domains. In the context of nonprofit organizations, the organizational culture is a complex entity that extends beyond the surface, encompassing underlying norms, values, and assumptions that exert a substantial influence on employee behavior (Elsbach & Stigliani, 2018; Schein, 2010). Furthermore, designed thinking tools are proposed as mechanisms for instilling motivation under leadership's guidance, thus fostering an organizational climate that elevates employee performance (Paais & Pattiruhu, 2020). The resultant motivation and performance cultivated through this culture are essential for the success and sustainability of nonprofit organizations.

Similarly, within the healthcare sector, the work culture plays an equally pivotal role, exerting an impact on outcomes, organizational commitment, and employee turnover (Schuller et al., 2015; Vazquez, 2019). The effective cultivation of communication and engagement within this culture carries profound implications, especially in terms of enhancing patient care quality (Bodinson & Bodinson, 2005; Weick & Quinn, 1999). Leadership's significance in both contexts cannot be overstated. Through this research, I sought to explore how leadership operates within the distinctive framework of organizational culture, with a particular emphasis on the challenges posed by resource constraints in nonprofit organizations.

In addition to the profound impact of organizational culture and leadership in nonprofit organizations and healthcare, it is crucial to recognize that sustainability stands at the core of an organization's long-term viability (Odor, 2018). Sustainability extends beyond mere survival and encompasses efficient adaptation to environmental shifts and strategic decisions. Leadership's role in shaping sustainable practices is equally crucial, influencing various aspects from business functions to marketing strategies (Stanley, 2020). With sustainability serving as a foundational pillar, I aimed to explore the intricate dynamics of organizational culture, leadership, and designed tools within nonprofit organizations, all while keeping a keen focus on the unique challenges posed by resource constraints.

Sustainability

Sustainability within organizations is multifaceted, encompassing various factors crucial for long-term viability and success. Sustainability in organizations involves

adaptation, operational efficiency, leadership, engagement, and personnel support (Odor, 2018). It's marked by long-lasting operations, financial performance, and the delivery of quality services. Business designs promoting sustainability are key for long-term success (Johnson et al., 2017). Researchers have highlighted the comprehensive nature of sustainability, emphasizing its importance for an organization's continued existence, financial health, and the delivery of quality services. Leadership plays a vital role in shaping sustainability efforts, alongside factors such as business-nonprofit engagement, website utilization, and personnel knowledge. Wang (2022) underlined the significance of leadership in fostering sustainability through training, interactions, and relationship-building with employees. This intricate interplay of factors creates a holistic approach to achieving and maintaining organizational sustainability, covering both operational and financial aspects.

Success

Defining and understanding organizational success within the context of nonprofit organizations includes considering its components, such as strategic competencies, image, advocacy, goal measurement, innovation, and strategic planning. Organizations often grapple with challenges due to inadequate strategic competencies, leading to uncertainty and problems (Black et al., 2007; Stanley, 2020). Defining success is crucial, with organizational image, effective advocacy, and various attributes contributing to its identification (Pereira de Castro Casa Nova et al., 2018; Zhang & Guo, 2020). Goal measurement positively impacts leaders' actions and engagement.

Nonprofit success is driven by a dynamic interplay of elements, including organizational image, effective advocacy, and strategic approaches. Goal measurement is instrumental for aligning actions with desired outcomes. Innovation and strategic planning are key drivers of success, especially in challenging environments (Malkus, 2011; Strang, 2018). The evidence highlights the multifaceted nature of organizational success in nonprofits, emphasizing the importance of various elements for effective management and long-term viability. The systematic examination of these factors is essential for sustaining organizational excellence within nonprofit organizations. By methodically exploring success factors, nonprofits can foster successful management and long-term viability.

Branding

Branding plays a crucial role in nonprofit organizations, especially in a competitive landscape, fostering donor engagement, and attracting monetary incentives (Gregory et al., 2020; Stanley, 2020). As charitable giving increases, nonprofits face heightened competition for donors' attention, time, and resources (Blackwood et al., 2012; Faulkner & Romaniuk, 2019; Wymer & Casidy, 2019). Brand elements such as logos, slogans, and messaging play a significant role in creating recognition and a competitive edge (Sääksjärvi et al., 2015). Shehu et al. (2016) emphasized the interplay between brand personality, donor engagement, and monetary incentives, underlining the importance of an integrated approach. The evidence highlights how branding plays a pivotal role in distinguishing nonprofit organizations within a competitive landscape and engaging donors effectively. This interconnected approach further emphasizes the

influence of brand personality, incentives, and trustworthiness. This focus on branding is essential for nonprofits to stand out and capture the interest of potential donors. The strategic use of logos, slogans, and messaging differentiates nonprofits from their competitors, enhancing the impact of incentives and brand personality on donation intentions.

In the landscape of nonprofit organizations, branding emerges as a pivotal strategy for navigating a competitive environment and effectively engaging potential donors. The challenge of standing out within a growing sector underscores the importance of effective branding to achieve competitive advantage (Faulkner & Romaniuk, 2019; Wymer & Casidy, 2019). Shehu et al.'s (2016) insights highlighted the delicate balance between branding and incentives, emphasizing the need for a cohesive approach to enhance donor engagement and intentions. This interconnectedness further accentuates branding's role in driving successful donor relationships within the context of nonprofit organizations.

Successful Branding. Successful branding in the nonprofit sector encompasses elements like logos, slogans, and messaging, which form the foundation for a strong brand identity and positive influence, with brand strength serving as a key indicator. Key success elements in branding include logos, slogans, and messaging, contributing to a strong brand identity (Gregory et al., 2020; Keller, 2003; Sääksjärvi et al., 2015). These elements create positive awareness and symbolism, impacting the nonprofit brand (Gregory et al., 2020; Keller, 2003). Brand strength is a significant indicator of successful branding, with leading indicators assessing marketing outcomes and brand performance

among peer organizations (Gregory et al., 2020; Wymer et al., 2016). The strategic incorporation of logos, slogans, and messaging in successful branding not only fosters a distinctive brand identity but also lays the foundation for creating positive associations and awareness, with brand strength serving as a key indicator of effective branding, and a well-defined strategy, aligned with fundamental principles, is crucial for navigating the complexities of branding success. Effective branding is built upon the strategic integration of elements like logos, slogans, and messaging, forming a unique brand identity that connects with stakeholders. These elements play a vital role in creating positive associations and awareness, reinforcing the brand's significance (Gregory et al., 2020; Keller, 2003). Brand strength reflects the effectiveness of these elements in capturing attention and engaging audiences (Wymer et al., 2016). Consequently, a well-structured branding strategy, aligned with core principles, becomes pivotal in navigating the intricacies of achieving successful branding. In the nonprofit sector, effective branding is a dynamic force, as it brings together key elements such as logos, slogans, and messaging, coalescing to create a robust brand identity with a profound positive influence. The components of successful branding, including logos, slogans, and messaging, coalesce to form a strong brand identity with positive influence (Gregory et al., 2020; Keller, 2003; Sääksjärvi et al., 2015). The assessment of brand strength and leading indicators underscores branding's impact on marketing outcomes and peer comparisons (Gregory et al., 2020; Wymer et al., 2016). Effective branding involves not only strategic elements but also clear communication and engagement with employees, contributing to a positive work culture and alignment with brand promises (Liu et al.,

2017; Stanley, 2020). This interconnected approach between branding elements and organizational engagement highlights the dynamic role of branding within the nonprofit sector.

   Failure. Failure in nonprofit organizations can be attributed to various factors, including lack of endowment funding, financial vulnerability, challenges with cash flow, and inadequate strategic planning. Nonprofit organizations' creation is underpinned by diverse theories and arguments, as highlighted by Siddiqui (2018) and Stanley (2020). The absence of endowment funding has been linked to the failure and closure of nonprofits (Rooney & Burlingame, 2020). Even funded nonprofits grapple with financial vulnerability, which can stem from internal or external challenges, such as political dynamics or stakeholder relationships (Rooney & Burlingame, 2020). Leadership decisions, such as withdrawing support or missing funding opportunities, can lead to financial setbacks (Rooney & Burlingame, 2020). In light of these multifaceted financial challenges faced by nonprofit organizations, effective leadership emerges as a pivotal factor in leadership decisions. Leadership decisions, as highlighted in the previous paragraph, play a crucial role in shaping the financial stability and success of nonprofits.

   In the intricate landscape of nonprofit financial challenges, leadership decisions play a pivotal role in ensuring successful financial stability. These decisions are intricately intertwined with factors like endowment funding, cash flow issues, and political dynamics, all of which significantly impact the financial stability and sustainability of nonprofit organizations. Nonprofit financial challenges are multifaceted, ranging from endowment funding to leadership decisions (Rooney & Burlingame, 2020;

Siddiqui, 2018). Cash flow issues, political dynamics, and financial vulnerability further compound the risk of failure (Rooney & Burlingame, 2020). Ineffective strategic planning, a key responsibility of nonprofit leaders, can significantly impact fiscal performance, leading to diminished income and long-term sustainability concerns (Bennett, 2016; Mellat-Parast et al., 2015; Stanley, 2020). Nonprofit leaders rely heavily on earned income from programs and grants, making fiscal health crucial for their operations (Rooney & Burlingame, 2020). Within this landscape of nonprofit financial challenges, the critical role of leadership decisions becomes evident. As previously elucidated, elements including endowment funding, cash flow constraints, and the influence of political dynamics emerge as noteworthy contributors to these challenges (Rooney & Burlingame, 2020). An expanded understanding into how leadership decisions, alongside these factors, can impact the financial stability and sustainability of nonprofit organizations.

In the realm of nonprofit management, the intricate relationship between various contributing factors to failure highlights the central significance of two key elements: effective strategic planning and meticulous financial management. The complex interplay of factors contributing to nonprofit failure underscores the importance of effective strategic planning and financial management (Siddiqui, 2018; Stanley, 2020). Leadership decisions, cash flow challenges, and political dynamics can all influence an organization's financial stability (Rooney & Burlingame, 2020). Acknowledging these aspects and prioritizing detailed business strategies can help nonprofits avoid diminished fiscal performance and ensure long-term organizational health and sustainability (Stanley,

2020). The multifaceted challenges faced by nonprofits, as discussed in the preceding paragraph, necessitate effective leadership for sustainable solutions. Leaders should undertake a comprehensive exploration of the seminal role that leadership assumes within the context of nonprofit organizations.

Leaders

Leaders play a crucial role in shaping organizational culture, performance improvement, and resource management within nonprofit organizations. Leaders have utilized the Malcolm Baldrige performance excellence Model to foster sustainability and understand management as a total system (Jaskyte, 2004; Kast & Rosenzweig, 1972; Tettey, 2019). This model empowers leaders to align employee efforts with desired organizational outcomes, enhancing internal and external factors' impact on long-term organizational health (Vincent & Marmo, 2018; Wang, 2022). Effective leadership strategies, such as optimizing human and financial resources, are essential for organizational success (Lower & Czekanski, 2019; Masaldzhiyska, 2019). To underscore the significance of leaders' adoption of the Malcolm Baldrige performance excellence model, it is essential to recognize leader commitment to sustainable practices and comprehensive organizational management (Jaskyte, 2004; Tettey, 2019). As I explored the critical role of leadership within nonprofit organizations and nonprofit utilization of the Malcolm Baldrige performance excellence model, it became evident that leaders who prioritize these principles gain a competitive advantage. In the following discourse, I will undertake how to centralize the optimization of human resources and managing resources strategically are pivotal aspects of effective nonprofit leadership.

Leaders who prioritize the model's principles and align employee contributions with organizational objectives enhance their competitive advantage. Centralizing the optimization of human resources is pivotal for bolstering both competitiveness and growth. It's crucial for leaders to acknowledge the scarcity of resources, such as volunteers and finances, to prevent hampering organizational effectiveness. Utilizing the Malcolm Baldrige performance excellence model illustrates leaders' commitment to sustainable practices and effective management. This model enables leaders to synchronize employee efforts with organizational goals, ultimately impacting long-term organizational well-being. Effective resource management strategies significantly contribute to competitive advantage and organizational expansion. Capturing workforce insights and knowledge through strong leadership enhances organizational governance, including areas such as board of director development and volunteer development, thereby underscoring leaders' critical role in nonprofit success.

Governance

Governance plays a vital role in nonprofit organizations for the purpose of sustainability. Governance is fundamental in healthcare institutions, impacting sustainable development, policymaking, and clinical performance. Governance serves as a linchpin in both business strategy and clinical effectiveness, crucial for healthcare's continuity (Chang et al., 2018). Middle managers, functioning as leaders, play pivotal roles in shaping the organization's future and supporting its structure (Vincent & Marmo, 2018). Social factors have been identified as influential in healthcare sustainability and improving quality of life. Sustainability within governance is imperative for ensuring the

long-term viability and effectiveness of nonprofit institutions. Governance also plays a

critical role in nonprofit organizations, particularly in terms of sustainability and

resilience. This encompasses principles of sustainable development, with nonprofit

systems in the European Union addressing governance challenges through policy

measures and financial incentives. The COVID-19 pandemic revealed governance issues

in nonprofits. The impact of governance extends beyond healthcare, influencing

policymaking, and clinical performance. Furthermore, strategies focusing on coverage

practices are pivotal for evaluating sustainable governance, given its profound

significance in nonprofit systems. In essence, governance stands as a cornerstone in

nonprofit sectors, significantly impacting sustainability and resilience, as exemplified

during the challenging times of the COVID-19 pandemic.

Board of Director Development

Developing an effective BOD is vital for nonprofit organizations' governance and

long-term sustainability. Governance encompasses various facets, including board

structure, responsibilities, diversity, and effectiveness. Board members play a central role

in governance and provide advisory support to senior management. Key attributes

expected from board members are expertise, diversity, and prior board experience. An

efficient BOD is crucial for effective governance and sustainable success in nonprofit

organizations. This emphasizes the importance of selecting board members with the right

qualifications and experience to fulfill their responsibilities effectively.

Engaged board members and a strong BOD are crucial for organizational health

and success. The significance of engaged board members lies in their ability to build

effective relationships within the organization. Additionally, a robust BOD plays a vital role in enhancing governance effectiveness. For new members, such as those in nonprofits receiving organizational support is essential for a smooth transition into managerial roles and for their contributions to both financial and nonfinancial aspects. Recognizing the importance of engaged board members and fostering a strong BOD is essential for maintaining organizational health and achieving success. Furthermore, offering support to new board members like those in nonprofits are crucial for their integration and meaningful contributions. In the context of nonprofit organizations, these principles of effective board governance can significantly impact an organization's ability to fulfill its mission and thrive in its endeavors.

The efficiency and effectiveness of a nonprofit organization's BOD are essential for its success and sustainability. An efficient BOD is crucial due to the expertise, engagement, and interactions of its members. These factors significantly impact organizational health and effectiveness. Moreover, strategic board interlocks, where shared members collaborate and share knowledge, can provide additional benefits, including improved governance, increased funding opportunities, and valuable operational insights. Developing and maintaining an efficient BOD should be a priority for nonprofit organizations. Ensuring that board members are engaged and interact effectively can lead to improved organizational outcomes. Additionally, exploring strategic board interlocks can open access to valuable partnerships and resources. Effective governance through a capable BOD is fundamental to the success and longevity of nonprofit organizations. By fostering expertise, engagement, and strategic

collaborations, nonprofits can navigate challenges and thrive in their missions. Certainly, before delving into volunteer development, it's important to recognize that an engaged and efficient BOD sets the foundation for an organization's overall success.

Volunteer Development

Volunteer development is a crucial aspect of nonprofit governance, contributing to organizational effectiveness and long-term sustainability. Nonprofit leaders play a significant role in fostering volunteer development, creating a division of labor and expanding the organization's bench depth (McAllum, 2018). Volunteers bring valuable skills and resources that support both long-term organizational and financial health, extending beyond employee retention and hiring capabilities (Zollo et al., 2019). Effective strategic planning, policy-making, stewardship, external relations, and accountability are key factors that influence volunteering development within nonprofits (Zollo et al., 2019). Volunteers are the lifeblood of many nonprofit organizations, and their contributions extend well beyond their immediate tasks. Volunteers play an important role in nonprofit governance and leaders should explore how their dedication and service impact various facets of organizational health and effectiveness.

In the realm of nonprofit governance, volunteer development emerges as a pivotal factor, shaping the very core of an organization's effectiveness and sustainability. The role of volunteering and its commitment is essential in understanding the interconnectedness between a nonprofit's governance and its overall effectiveness (Zollo et al., 2019). Volunteer development not only enhances the skills and contributions of volunteers but also aligns their behavior with the organization's vision and mission (McAllum, 2018).

The integration of volunteer development into nonprofit governance serves as a strategic approach to bolstering organizational effectiveness and ensuring long-term sustainability (McAllum, 2018; Zollo et al., 2019). By leveraging volunteers' skills, resources, and alignment with the organization's vision, nonprofit leaders contribute to a division of labor that enhances bench depth and overall operational capabilities (McAllum, 2018; Zollo et al., 2019). This proactive approach, encompassing volunteer development and its alignment with strategic planning and governance, strengthens the organization's ability to fulfill its mission and remain sustainable.

Strategic Planning

Components and importance of strategic planning are the evolving challenges faced by businesses in day-to-day operations. Day-to-day operations have underscored the significance of effective strategic planning. A robust strategic plan encompasses specific endpoints that align with the organization's vision and mission. Hicks and Petrosoniak (2018) emphasized that strategic planning serves as a means for leaders to enhance the organization's long-term outcomes. This plan involves a deep exploration of finance, financial goals, and financial performance, profoundly influencing the organization's leaders and managers.

Strategic planning is a comprehensive process composed of five key steps: vision statement, mission statement, analysis, strategic formulation, and strategy implementation and management (Bigelow & Pratt, 2022). Each step contributes to the overall framework, enabling organizations to chart a clear path towards their goals. By encompassing these vital components–vision statement, mission statement, strategy

implementation, and management–strategic planning becomes a pivotal tool that equips

businesses to navigate the challenges of day-to-day operations and work towards

sustained success.

Vision Statement

The creation of a vision statement represents the initial step in the strategic

planning process and defines the role and purpose of this essential statement. This

statement acts as a cohesive framework, aligning various objectives and priorities to

contribute to organizational health. Scholars like Kirkpatrick (2016), Lucas (1998), as

well as Shamir et al. (1993), have recognized the importance of a vision statement.

Kirkpatrick defined a vision statement as a shared and idealistic representation of an

organization's long-term future. The vision statement serves the purpose of offering a

comprehensive view of core ideologies, encompassing values, purpose, and future

direction.

The vision statement's primary goal is to inspire, achieve, and establish financial

sustainability and long-term organizational health. By outlining a clear and aspirational

path, the vision statement guides an organization towards fulfilling its mission. This

foundational vision statement plays a crucial role in guiding an organization's strategic

decisions and setting the tone for subsequent steps in the strategic planning process.

Mission Statement

A mission statement focused on financial health highlights a company's

commitment to survival, growth, and profitability. This statement contributes to long-

term organizational health and sustainability, encapsulating goals and innovative

strategies. The mission statement encompasses essential elements of strategic planning, including target customers, main products, geographic domain, core technologies, commitment to growth, philosophy, self-concept, and desired public image.

Nonprofit leaders aiming to redefine their mission must embrace strategic partnerships and executions. Successful strategic execution necessitates effective processes across the entire organization. Complementary approaches, such as conceptual frameworks and empirical validation, can enhance high-performance research models and recommendations. This avenue allows for the introduction of innovative services, contributing to long-term organizational growth. By understanding business-nonprofit engagement, sustainable financial management is achieved through strategic partnering, ensuring resource integration and organizational value. Moreover, it's essential to comprehend the requirements of evaluation tools for enhancing strategic planning.

Analysis

The analysis step in strategic planning, the third phase of the strategic planning process involves analysis. This step focuses on examining an organization's external and internal factors, core competencies, and business trends. External opportunities and threats are identified through tools such as Porter's five forces model, which evaluates industry competition, customer relations, new entrants, and bargaining power with suppliers. Additionally, internal analysis can be conducted using the industry evolution model, revealing insights into growth stages and market dynamics.

A value-chain analysis, combined with tools like activity-based costing and benchmarking, aids in understanding an organization's value-creation process, resource

capabilities, costs, productivity, and competencies. The SWOT model, a classic management framework, helps prioritize actions by exploiting external opportunities and weaknesses while addressing existing threats. It's imperative for nonprofits to embrace a variety of evaluation tools, as demonstrated by Persaud (2021), to enhance strategic planning and program design. This strategic planning process impacts an organization's financial well-being and vulnerability, as exemplified by De Sousa et al. (2019), Hu and Kapucu (2017), and Stanley (2020). AlMulhim (2020) highlighted the significance of identifying a strong positive correlation between tacit knowledge and organizational learning, contributing to overall organizational success. Transitioning from the preceding discussion on evaluation tools, I pivot my attention to strategic formulation, a critical element of an organization's long-term strategic framework.

Strategic Formulation

Strategic formulation, considered a long-term strategy, plays a crucial role in organizations. Models like Porter's generic strategies offer a framework for competitive advantage, including options like low-cost leadership, differentiation, best-cost provider, focused low-cost, and focused differentiation. Leveraging tacit knowledge and organizational learning fosters sustainability and a competitive edge through knowledge creation within the workforce (AlMulhim, 2020). Strategic formulation contributes to financial performance and a competitive advantage, as highlighted by AlMulhim (2020) and López-Cabarcos et al. (2019).

The utilization of tacit knowledge and organizational learning becomes particularly significant amidst governmental regulations and funding opportunities.

Optimizing limited financial resources enhances decision-making, program improvements, and administration, leading to meaningful data accumulation and long-term financial goals (De Sousa et al., 2019; Persaud, 2021). Integrating a strategic process that supports leadership, problem-solving, and business skills is crucial for nonprofit leaders seeking organizational success (Tatangelo, 2018). The integration of decision-making processes and data analytics, as noted by West (2019), effectively embeds strategic planning into organizations. Addressing factors like structure within strategic planning supports equity, interventions, and policies, thus contributing to organizational-level health (Browne et al., 2018). In the context of the philanthropy environment, where effective strategy implementation is crucial for promoting organizational-level health equity, it is vital to consider approaches like the balanced scorecard (BSC) for translating strategies into operational actions and financial goals.

Strategy Implementation and Management

Effective strategy implementation is essential for managing disruptions in the philanthropy environment and promoting organizational-level health equity. Utilizing approaches like the balanced scorecard (BSC) can translate strategies into operational actions, financial goals, and four key dimensions. BSC serves as a potent instrument for monitoring strategy execution and ensuring organizational-level health equity. This equity orientation enhances an organization's capacity and focuses on establishing financial goals across employees, functional areas, and business units.

The implementation of strategies, including staff involvement and job category improvements, empowers organizations. Organizational-level health equity aids in

understanding community contexts, providing data feedback for clinics on key funding issues within patient populations. This strategy is pivotal for philanthropic environments, addressing taken-for-granted practices, policies, and systems that contribute to inequities. Recognizing strategies suited for philanthropic environments is vital for assessing an organization's strategic direction. Nonprofit leaders must consider internal and external factors, financial and nonfinancial measurements, and disruptive innovation knowledge to enhance an organization's philanthropic climate. The philanthropic environment's impact encompasses areas such as formation and operation, tax and fiscal issues, political and socio-cultural aspects, economic conditions, and future philanthropic trends.

Measurements, Analysis, and Knowledge Management

It's critical for nonprofit leaders to create a management system that aligns economic activities with the organization's purpose and emphasizes meaningful connections. The process of defining the organization's phenomenon involves clearly outlining or describing a specific occurrence, situation, or aspect within the organization. Organization's phenomenon is crucial, as it identifies the mission and purpose, providing a foundation for future funding sources (Cannon & Kreutzer, 2018). The Baldrige Excellence Framework serves as a valuable approach for nonprofits seeking sustainability, aiding in the reinvention process while ensuring long-term organizational and financial health. Baldrige Performance Excellence Framework (2018) implementation assists leaders in developing holistic systems, setting strategic objectives, creating performance measurements, and capturing measurable outcomes for clear understanding. As nonprofit leaders aim to create a management system that aligns

economic activities with the organization's purpose and emphasizes meaningful connections, the application of measurement, analysis, and knowledge management principles is essential for assessing performance and improving processes. This comprehensive approach ensures organizations can effectively add value to their missions and capture their multifaceted success.

Nonprofit leaders should use measurement, analysis, and knowledge management principles to assess performance and improve processes. Measurement, analysis, and knowledge involves selecting relevant metrics, utilizing historical data for forecasting, and considering both financial and nonfinancial measurements while factoring in internal and external factors (Baldrige Performance Excellence Program, 2017; Brosan & Levin, 2017; Hamid, 2018b; Tysiac & Drew, 2018). This comprehensive approach ensures organizations can effectively add value to their missions and capture their multifaceted success.

Financial Measures

The role and importance of financial measures and the concerns about economic failure, especially in businesses involving stakeholders, have been highlighted. Deo (2019) noted the persistent concern of economic failure in businesses with stakeholder involvement. Stakeholders, such as investors, lenders, employees, and managers, offer diverse perspectives on an organization's financial health. Economic risks, which are ongoing, can complicate monitoring and reporting, potentially impacting management's ability to mitigate negative outcomes.

Nonprofit leaders face the responsibility of effectively managing and monitoring financial measures within their organizations. They often feel pressure to adopt for-profit approaches that prioritize innovation and sustainability. Financial models, encompassing various factors like cash flow, economic value-added, asset management, financing decisions, and profitability ratios, provide a structured approach for valuation and risk identification. These financial measures enable leaders to take proactive actions to prevent financial distress and support both short-term and long-term objectives. Understanding the role of financial measures and their significance in both for-profit and nonprofit sectors is crucial for organizational sustainability and risk management.

Long-Term Objectives

Long-term objectives and organizational sustainability are critical for an organization's continuity and success. Organizations, whether profit-oriented or nonprofit, must focus on adapting to their environment, optimizing operations, managing costs, and fostering innovation (Odor, 2018; Santora & Bozer, 2015; Zollo et al., 2019). These long-term objectives not only impact financial health but also support partnerships and innovation. They are crucial for organizations' survival and value creation for various stakeholders, including customers, patients, and shareholders. In conclusion, long-term objectives play a pivotal role in shaping an organization's trajectory, fostering sustainability, and creating lasting value for all involved.

Short-Term Objectives

A manager's decisions on short-term objectives can affect profit goals and sustainability. Short-term objectives are vital for strategic planning, environmental

sustainability, and performance evaluation (Lee & Hageman, 2018). Balancing financial and nonfinancial considerations is crucial, but emphasizing environmental sustainability may temporarily reduce profits (Lee & Hageman, 2018). In conclusion, managers' choices regarding short-term objectives involve trade-offs between immediate financial gains and long-term sustainability. Balancing short-term profit and long-term sustainability is a complex challenge for business leaders. Epstein and Buhovac (2014) and Lee and Hageman (2018) have highlighted this challenge. It involves reconciling short-term profit goals with long-term sustainability objectives. Achieving this balance is crucial but intricate, often requiring careful consideration of environmental sustainability policies. This dynamic balance is vital for business success and sustainability.

Nonfinancial Measures

Nonfinancial measures are significant for organizations. West and Ries (2018) identified these measures, including communication, leadership, governance, people management, regulations, risk mitigation, and management. These measures are interconnected with performance measures, enhancing business strategies by providing guidance, control, and a routine. Nonfinancial measures contribute to positive outcomes such as reflecting business status, improving communication, and aiding decision-making, as highlighted by Cannella et al. (2013), Dweekat et al. (2017), and Nguyen et al. (2020). Incorporating nonfinancial measures into business practices is crucial for achieving better performance and decision-making.

Nonfinancial measures offer a comprehensive understanding of organizational systems, fostering learning and development (Dominguez et al., 2018; Nguyen et al.,

2020). Implementation benefits nonprofit leaders by attracting and retaining talent

(Stanley, 2020). In healthcare, they align with patient safety and mission objectives

(Kaplan & Norton, 2006). UK hospitals have employed nonfinancial measures to

enhance operations (Malmmose, 2019). For nonprofits, website engagement and

efficiency improvements can strengthen relationships (Hoefer & Twis, 2018). Comparing

performance against peers provides insights into competition and funding opportunities

(Sharp, 2018). This holistic view of organizational operations through nonfinancial

measures sets the stage for a deeper exploration of the nonprofit sector's financial

landscape.

Nonprofit Reliance on Funding

Nonprofits heavily rely on funding opportunities, as reflected in the substantial

financial landscape of the nonprofit sector. In 2019, registered nonprofits in the IRS

reported a staggering $2.62 trillion in revenues and held assets totaling $5.99 trillion.

Specifically, in 2016, approximately 59.7% of nonprofits identified as public charities,

contributing significantly to the sector's total financial activity with $2.04 trillion in

revenues and $1.94 trillion in expenses, accounting for a substantial portion of the

sector's $3.79 trillion total (Non-profit Sector in Brief, 2019). This sector exhibited

positive financial growth from 2006 to 2016.

Diversifying funding sources is crucial for nonprofits to manage fluctuations in

available funds. This involves strategic collaboration with various entities, including

other nonprofits, for-profit organizations, and government agencies (Hughes &

Luksetich, 2004; Kreutzer, 2008; Shumate et al., 2018). Such a strategic approach aligns

the organization's essence with mission identification and future funding sources.

Additionally, collaboration with senior leaders plays a pivotal role in mitigating funding

uncertainty (Guo & Acar, 2005).

Measuring the substantial influence of nonprofit reliance on funding, particularly

given the significant contributions from individuals, foundations, and businesses

(Reynolds & Reynolds, 2019), amounting to $427.71 billion in 2018, as reported by the

Giving USA Foundation, necessitates a thorough evaluation of strategic approaches. As

the financial landscape of nonprofits continues to evolve, it becomes evident that active

engagement with specific strategies is essential for sustainable growth. To this end,

nonprofit leaders must Act by fostering collaboration and implementing innovative

methods. Learning from past experiences and adapting to changing circumstances is

paramount, highlighting the importance of a cyclical approach, especially when

considering funding growth option, earned income, government funding, grants, and

charitable donations and gifts, and investment, all contributing to ensuring long-term

sustainability and success.

Funding Growth Options

In the last decade, nonprofit organizations, especially in the health sector, have

experienced substantial growth, with revenue increasing from $739.7 billion in 2006 to

$1016 billion in 2016. This sector's expansion is significant, representing more than

three-fifths of the entire nonprofit sector's $505.1 billion (Non-profit Sector in Brief,

2019). Charitable organizations, including nonprofits, are morally obliged to address

genuine needs (Guo & Saxton, 2017).

Nonprofits seeking to effectively serve their missions must forge connections with external stakeholders and critical resources (Guo & Saxton, 2017). The avenues for funding growth are diverse and include contributions, earned revenue, government funding, grants, charitable donations, and investments. Funding opportunities not only facilitate the realization of an organization's vision and mission but also contribute to mitigating volatility (Berrett & Holliday, 2018; Hurt, 2021). As nonprofit organizations navigate growth options, their commitment to addressing true needs remains a guiding principle (Guo & Saxton, 2017). The ever-expanding landscape of funding opportunities, especially in sectors like healthcare, underscores the significance of harnessing external resources to sustainably advance the organization's goals.

Earned Income

Nonprofit organizations' reliance on earned revenue for sustainability and their need to strategically assess income streams to maintain financial stability are crucial aspects of their operational strategy. Nonprofit organizations heavily rely on earned revenue to ensure the sustainability of their mission-driven endeavors (Levine, 2021). Earned revenue can be categorized and evaluated based on programs or commercial activities (Levine, 2021). Levine (2021) noted that earned revenue can originate from monetized core services or activities that are unrelated to the core services. Additionally, the degree of connection to earned revenue impacts service delivery, as highlighted by Levine Daniel and Kim (2018). Understanding the sources and nature of earned revenue is essential for navigating the challenges of securing necessary funds. Nonprofits must

strategically assess their income streams to fulfill their mission while maintaining financial stability.

     In the nonprofit sector, strategic resource acquisition influenced by the competitive environment, the nuanced evaluation of services, and the balance between earned income and mission-driven focus are pivotal elements that dictate the financial viability and achievement of an organization's goals. The competition for resources within the nonprofit sector necessitates strategic resource acquisition approaches, influenced by the competitive environment (Fowles & Eckerd, 2015; Levine, 2021). Nonprofit leaders navigate the challenges of securing necessary funds by leveraging earned income, which often involves a nuanced evaluation of their services and activities. In their pursuit of sustainability, nonprofit organizations must navigate the complexities of earning revenue and resource competition, all while upholding their mission-driven focus (Levine, 2021). The link between earned income and service delivery dynamics, as discussed by Levin (2021) and Levin Daniel and Kim (2018), highlighted the intricate relationship between financial viability and the realization of an organization's goals. The multifaceted challenges and strategic considerations faced by nonprofit organizations, as outlined in the preceding section, lay the groundwork for a comprehensive examination of the dynamics between nonprofits and government agencies in the realm of public service, underscoring the intricate interplay of financial sustainability and effective service delivery.

Government Funding

The examination of nonprofits' contributions to public service is crucial for establishing a foundation of coproduction and cogovernance. Nonprofit leaders confront challenges in sustaining desired funds and public service diversification (Cheng, 2019). The funding relationship between government agencies and human service nonprofit providers holds paramount importance, ensuring effective service delivery while mitigating the burden on both government and nonprofits, particularly during economic crises (Piatak & Pettijohn, 2021). Government funding grants nonprofits flexibility to navigate economic downturns (Piatak & Pettijohn, 2021). The examination of nonprofit contributions to public service and their interdependence with government funding and collaborative strategies, as discussed in the preceding section, sets the stage for understanding the intricacies of co-governance and partnership strategies that underpin the sustainable delivery of essential social services.

The symbiotic relationship between government funding and nonprofit engagement in public service is integral for the sustainable, effective delivery of social services, underscoring the importance of harmonizing collaborative efforts to achieve societal goals. The planning strategy for public service governance necessitates an emerging collaboration between government and nonprofits (Cheng, 2019). The partnership between nonprofits and government agencies supports predefined and allocated funding, as well as existing government programs for social services like human services and education (Kieler, 2019). However, this collaboration often involves adhering to specific requirements for outsourcing and fund receipt, such as

reimbursement formulas or the Request for Proposal process. The symbiotic relationship

between government funding and nonprofit engagement in public service is integral for

sustainable, effective service delivery and coping with economic fluctuations (Piatak &

Pettijohn, 2021). The link between government and nonprofits in terms of funding and

collaborative strategies underlines the importance of harmonizing efforts to achieve

societal goals.

Grants

The data from The Foundation Center's 2019 report underscores the substantial

growth in the number of grantmaking foundations, the total value of private charitable

contributions, and the significant increase in foundation assets over the past decade in the

United States. The Foundation Center's report in 2019 highlighted that grantmaking

foundations in the United States numbered 86,124 in 2017 (McCambridge, 2019). These

foundation grants, classified as private charitable contributions, amounted to $77.7 billion

in 2017, adjusted for inflation from 2016 (McCambridge, 2019). Remarkably, there has

been a 70% increase in grantmaking foundations since 2005 (McCambridge, 2019).

Furthermore, the assets within foundation grants exhibited a substantial 46.6% growth,

rising from $691 billion in 2005 to $1012.9 billion in 2017 after accounting for inflation

(McCambridge, 2019). The data from The Foundation Center's 2019 report not only

highlights the remarkable growth in grantmaking foundations and their assets but also

emphasizes their growing significance in supporting various causes and initiatives. This

upward trend in grantmaking foundations is indicative of the evolving landscape of

philanthropy and the pivotal role of foundation funding in addressing societal needs.

The upward trend in grantmaking foundations underscores their growing

significance in supporting various causes and initiatives. The substantial increase in both

the number of foundations and the assets allocated to grants over the past decade

demonstrates a heightened focus on philanthropy and the role of foundation funding in

driving positive change. As the landscape of philanthropy continues to evolve, the data

from The Foundation Center (2019) showcases the substantial impact of foundation

grants in addressing societal needs. The remarkable growth in foundation contributions

serves as a testament to the collaborative efforts of philanthropic organizations and the

potential for driving positive transformation.

Charitable Donations and Gifts

Donations from individuals are critical resources for nonprofit organizations,

especially smaller ones, with a significant portion of their funding reliant on these

contributions. According to a recent research report from the Nonprofit Trends and

Impacts 2021, approximately three-quarters of nonprofits regard individual donations as

essential or very important for their operations. Notably, smaller nonprofits with expenses

under $500,000 rely even more heavily on individual donations, making up over 60% of

the organizations in the study. These smaller nonprofits reported that about 30% of their

revenue is derived from individual donations, a considerably higher percentage compared

to larger organizations with annual budgets of $500,000 or more. The data highlights the

critical role individual donations play in the financial sustainability of nonprofits,

particularly for smaller organizations. It underlines the importance of understanding the

funding dynamics within the nonprofit sector, with individual contributions often forming

a significant part of their financial resources. Moving forward, as nonprofit organizations explore innovative strategies to attract donations and gifts, it becomes clear that the willingness of individuals and corporations to contribute to social causes continues to grow. This shift toward greater philanthropic engagement aligns with recent trends observed between 2015 and 2019, with fluctuations noted since 2020. The adaptability and effectiveness of online giving and crowdfunding platforms in engaging a wider audience are becoming increasingly evident. Additionally, the rise of impact-driven philanthropy signifies that donors are seeking transparency and measurable results. These trends reinforce the necessity for nonprofits to not only attract contributions but also to demonstrate the tangible impact of these donations. While more recent data may provide further insights, the consistent message remains that charitable donations and gifts remain indispensable resources for nonprofit organizations to achieve their mission and realize their growth.

Investment Income

Small business owners are leveraging their personal and past experiences to identify successful opportunities for capitalization. Collaborative efforts with public engagement can lead to securing growth funding for small business owners (Jeppsson, 2018). This collaborative process involves business leaders, banks, attorneys, and auditors to assess and evaluate business viability. Often, small business owners explore alternatives to public offerings to retain autonomy (Jeppsson, 2018). The collaborative efforts and personal experiences highlighted in the first paragraph demonstrate that small business owners are actively seeking innovative ways to secure growth funding. Building

upon this theme, the second paragraph delves into the significance of personal preferences and strategic partnerships in enhancing funding prospects, particularly for addressing public needs, and explores dynamic funding avenues such as crowdfunding, presenting a more expansive and modern approach to financial resource acquisition.

The personal preferences of small business owners play a pivotal role in steering their decisions, ensuring long-term organizational health and sustainability. The utilization of personal interests of investors for charitable contributions further enhances funding prospects, particularly for public needs (Arvidson & Linde, 2021; Ostrander, 2007). The increasing trend of nonprofit and for-profit partnerships, as highlighted by Bocquet et al. (2020) signifies a dynamic landscape where funding opportunities are sought to bolster organizational and financial health. In the realm of funding, small business owners explore avenues like crowdfunding to attract venture capitalists and angel investors (Kim & Wie, 2018; Mihaela, 2017). Crowdfunding, as indicated by Kim and Wie (2018) and Mihaela (2017), presented an innovative approach to financing ventures, particularly for small businesses and nonprofits encountering challenges in the financial markets. The engagement possibilities of the internet enable a broad reach for funding appeals, thereby offering a novel way to secure resources.

Challenges of Funding

The disruption stemming from financial management and sustainability, encompassing sources like earned income, government funding, charitable donations, and investment incomes, can lead to operational breakdowns affecting service delivery and organizational competencies for public programs and services (Johnson et al., 2020). The

challenges of funding are underscored by Johnson et al. (2020), who highlighted the impact of revenue diversification on nonprofit financial health. Nonprofits employ revenue diversification strategies, incorporating government funding, donations, and financial institution funding, to build a buffer against financial instability and uncertainty (Hung & Hager, 2019). The challenges of funding diversification and the strategies implemented by nonprofits, as discussed in the first paragraph, underscore the importance of a proactive approach to address the financial management issues they encounter. In the second paragraph, we delve into the broader context, highlighting the impact of global economic events and the need for nonprofits to learn from available data, emphasizing the critical role of adaptability and resilience in navigating these complex challenges. The need for revenue diversification reflects nonprofits' proactive approach to mitigate the inherent challenges of funding variability. This strategic approach, as identified by Hung and Hager (2019), seeks to address the unique management challenges faced by nonprofit organizations. However, these challenges extend beyond funding strategies. Global economic events like the Great Recession of 2007-2009 and the Covid-19 pandemic have further exacerbated the funding challenges nonprofits encounter, revealing their vulnerability to external shocks. Despite the challenges, Bloodgood et al. (2022) shed light on the importance of learning from available nonprofit data to inform best practices. While constrained by limited access to data, nonprofits must strive to better understand and navigate funding challenges, ultimately enhancing their ability to weather uncertainties and sustain their essential contributions to society.

Impact of Government Funding

The repercussions of government funding for nonprofit organizations are multifaceted, encompassing the challenges posed by the uncertain nature of public funding and the constricting regulatory oversight that accompanies it. These challenges have been further exacerbated in recent times due to diminishing government funding availability, intensifying the competitive struggle among nonprofit leaders to secure and maintain limited resources. The repercussions of government funding are twofold, encompassing both the precariousness of public funding and the stringent regulatory oversight that accompanies it (Kieler, 2019). Nonprofit leaders, in navigating this landscape, often face a dilemma: voicing their concerns about government funding may expose them to potential retaliation (Kieler, 2019; Pettijohn & Boris, 2018). In recent times, the availability of government funding has diminished, intensifying the competitive struggle among nonprofit leaders to secure and maintain limited resources (Choi & Choi, 2014; Kieler, 2019; Levine Daniel & Kim, 2018). As we delve deeper into the impact of government funding on nonprofit organizations in the second paragraph, it becomes evident that the financial challenges discussed in the first paragraph are only part of the larger picture. Nonprofit leaders' hesitance to openly address government funding concerns and the growing resource scarcity further highlight the intricate balance they must maintain to secure support while preserving their autonomy.

The impact of government funding on nonprofits extends beyond financial considerations. Nonprofit leaders' reluctance to openly address government funding concerns highlights the delicate balance they must maintain to ensure continued support

while preserving their autonomy (Pettijohn & Boris, 2018). The decline in government funding availability exacerbates the resource scarcity nonprofits confront, prompting them to adopt competitive strategies for survival (Choi & Choi, 2014; Levine Daniel & Kim, 2018). The challenge of inadequate government funding coverage further underscores the complexities of sustaining programs with constrained financial support (Kieler, 2019; Marwell & Calabrese, 2015). The interplay of government funding, competitive dynamics, and resource limitations exemplifies the multifaceted nature of nonprofit sustainability and the strategic decisions nonprofit leaders must make to ensure their organizations' continued effectiveness and impact.

Impact of Financial Institutions

Small businesses often face financial limitations during their lifecycle, but those who can access diverse funding sources, including family wealth and loans from financial institutions, tend to experience ongoing growth, anticipate increased sales, and maintain a competitive edge within their respective markets, significantly shaping their long-term trajectory and sustainability. Small businesses commonly encounter financial limitations at various points in their lifecycle (SBA, 2018). Yet, select small business proprietors have the opportunity to navigate these constraints by securing funding through avenues such as family wealth and loans from financial institutions. Small business administration (SBA) data reveals that those small business owners with access to diverse funding sources often exhibit ongoing growth, anticipate increased sales, and enjoy a competitive edge within the marketplace (SBA, 2018). The availability of financial resources, including those from family wealth and loans from financial institutions, significantly

influences the trajectory of small businesses (SBA, 2018). This support fosters their expansion, enhances their sales potential, and bolsters their competitive positioning. However, it's important to acknowledge that numerous small businesses grapple with financial challenges, which can impede their long-term organizational health and sustainability. The interaction between small businesses, financial institutions, and funding sources underscores the pivotal role of financial access in shaping a business's growth trajectory, market competitiveness, and overall longevity.

Impact of Recession 2007–2009

The financial crisis of 2007-2009 had far-reaching effects on organizations, particularly nonprofits, challenging them to navigate the economic downturn and an increased demand for their services while dealing with diminishing government funding. This period tested the delicate balance between financial stability and service quality, highlighting the interconnectedness of economic conditions and the challenges in sustaining and improving service delivery during tumultuous times. The financial crisis of 2007-2009 had far-reaching effects on numerous organizations, recognized as a period of significant strain and adversity for financial outcomes (Kieler, 2019; Schoenberger & Binns, 2017). Amidst this crisis, nonprofit organizations particularly experienced a dual challenge: grappling with the economic downturn while simultaneously contending with an elevated demand for their services, even as government funding waned (Kieler, 2019; Park & Mosley, 2017; Schatteman & Bingle, 2017). The recession's impact stretched across diverse sectors, and its aftermath was a testing ground for organizations to balance financial stability and service demands (Kieler, 2019; Schoenberger & Binns, 2017).

Nonprofit leaders faced the delicate task of managing constrained resources while striving to enhance their service quality and reach throughout their operations (Graaf et al., 2016). The reverberations of the 2007-2009 recession underscored the interconnectedness of economic conditions, organizational financial resilience, and the challenges of sustaining and enhancing service delivery during tumultuous times.

Impact of COVID

In times of crisis, such as the COVID-19 pandemic, the funding landscape becomes even more precarious for nonprofit organizations that rely on diverse sources of income, including earned income, government funding, charitable donations, and investment income, to sustain their vital programs and services for the public good (Johnson et al., 2020). The importance of being financially prepared and possessing effective nonprofit governance capabilities has been underscored, as these factors are essential for maintaining the functioning of these organizations (Molk & Sokol, 2021). Crises magnify the already complex challenge of securing sustainable funding streams for nonprofits, as the demand for their services increases precisely when financial resources may become scarcer (Johnson et al., 2020). The COVID-19 pandemic exemplifies this dynamic, as nonprofits play a crucial role in providing support to vulnerable populations. The pandemic has led to increased demand for services such as food assistance, healthcare, and mental health support, placing additional strain on nonprofits' resources (Johnson et al., 2020). However, many nonprofits have experienced disruptions in their traditional funding sources, such as canceled events and reduced individual donations, leading to financial instability (Johnson et al., 2020). As these

organizations strive to respond to heightened needs, they are simultaneously grappling with significant funding challenges. The interplay between funding stability, effective governance, and the provision of essential services becomes particularly evident during times of crisis, emphasizing the importance of sustaining nonprofit organizations' financial health and ensuring robust governance structures to serve their missions effectively in the face of unforeseen challenges.

Transition

In Section 1, I outlined the foundation of this study, including the background of the business problem, the purpose statement, and the nature of this study. Academic scholars explored strategies for nonprofit leaders to maintain long-term organizational and financial health but provided limited evidence on processes to maintain long-term organizational and financial health. I sought to discover additional details on strategies within nonprofit organizations from the leaders' perspectives. My review and analysis of professional and academic literature included a critical review of the literature within the past 5 years to validate the need for research in this area.

In Section 2, I provided a comprehensive analysis of the research purpose, the role of the researcher, participants, research methods, design, population, sampling, ethical principles, human research, data collection instruments, data analysis, data organization technique, and qualitative data analysis. Finally, in Section 3, I used the 2017-2018 Baldrige performance excellence framework to conduct an in-depth meta-analysis of previously completed Walden University doctoral studies pertaining to the topic focus. I focused on several topics, including (a) organizational profile; (b)

leadership; (c) customer relationships; (d) measurement, analysis, and knowledge

management; I workforce; (f) operations; and (g) results of process and products. I used a

systems-based research approach for these several topics to accomplish exploration.

Section 2: The Project

Section 1 of this doctoral study comprises a robust foundation, offering a comprehensive literature review that delves into the strategies employed by nonprofit leaders to ensure the long-term organizational health of their organizations through financial change management. This section not only explores the existing body of knowledge, but also provides a detailed review of the study's purpose, research method, design, the role of the researcher, and the methods and techniques employed for data collection.

Purpose Statement

The purpose of this meta-analysis study was to explore strategies nonprofit organization leaders use to support financial change management in an organization for sustainability. The population for this study comprised previously approved Walden University doctoral studies that focused on the need for effective strategies to maintain long-term organizational and financial health in the United States. Utilizing the technique of meta-analysis, this study involved systematically reviewing and synthesizing the findings of multiple independent studies on the topic. The study's potential contribution to positive social change resides in the promotion and facilitation of long-term organizational health within emerging markets. Nonprofit leaders and small business owners could gain practical insights from this study's findings to create a competitive advantage, optimize available resources, promote sustainability, and expand growth. When nonprofit leaders utilize long-term organizational health with effective financial

change management strategies, then the community stakeholders benefit through improved services.

Role of the Researcher

As a researcher, I am identified as a data collection instrument (Hoeber & Shaw, 2017). I was the secondary data collection instrument for my meta-analysis study. I had no direct experience consulting and researching strategies for nonprofit leaders in nonprofits to maintain long-term organizational and financial health. As a researcher using meta-analysis, I performed analytical procedures to retrieve information from previously approved doctoral studies with common themes.

Barton et al. (2018) explained the importance of researchers incorporating the *Belmont Report* to ensure ethical behavior. The *Belmont Report* was the foundation for exhibiting ethical behavior as a researcher. The *Belmont Report* ensures that a researcher follows discipline-specific ethical principles, such as respect for persons, beneficence, and justice (Anabo et al., 2019; Barton et al., 2018). To uphold ethical standards, I initially sought participants' consent by asking them to read and sign a consent form and a service order agreement, aligning my actions with Walden University's Institutional Review Board (IRB) requirements. Although my research journey began with IRB approval for a consulting capstone client study, the client organization opted not to proceed, and I subsequently reapplied for IRB approval under the meta-analysis study, securing approval under the original number. Throughout my research, I prioritized unbiased practices, diligently addressing any potential bias with a focus on empirical evidence (Yin, 2018). Through this study, I not only aimed to contribute valuable

insights, but also sought to heighten awareness among nonprofit leaders about the informed consent process.

Participants

Walden DBA consulting programs require researchers to select participants with prior knowledge of a topic and the ability to implement change in the organization (Walden University, 2017a). Although my research journey began with IRB approval for a consulting capstone client study, the client organization opted not to proceed, and I subsequently reapplied for IRB approval under the meta-analysis study, securing approval under the original number. There were no participants for this meta-analysis study. Consent forms were not needed as all data and information for the study findings came from previously published resources. Yin (2018) stressed the significance of employing impartial practices and consistently addressing potential bias, with a primary focus on empirical evidence. I employed Yin's approach in my studies, concentrating on empirical evidence within my meta-analysis. Through my study, I not only aimed to contribute valuable insights, but also sought to heighten awareness among nonprofit leaders about strategies to support financial change management in an organization for sustainability.

Research Method and Design

A research method refers to the systematic approach and techniques used to conduct scientific investigations and gather data. Researchers employ various methods, such as qualitative, quantitative, or mixed methods, to explore research questions, collect information, and analyze findings, ensuring a structured and rigorous inquiry process.

The choice of research method depends on the nature of the research question and the desired depth of understanding or statistical analysis required for the study.

Research Method

To address the research questions in this qualitative study, the specific research design was meta-analysis. This approach was appropriate for this study because using the qualitative method enabled me to create a foundation for developing socially constructed meaning to address the purpose of the study. Researchers conduct meta-analysis studies to explore experiences and motivations, aligning with the study's focus on understanding the underlying factors contributing to success (Almalki, 2016; Yin, 2018). Qualitative researchers seek to address questions that focus on experiences and motivation (O'Connor & Joffe, 2020). I selected the qualitative method to investigate the successful strategies and processes employed by nonprofit leaders in maintaining long-term organizational and financial health. It is important, when selecting a proper research method, to fully understand the difference between qualitative and quantitative research. Qualitative research provides an in-depth understanding of structural processes and discovering lived experiences with participants (Ross et al., 2018; Stanley, 2020). Quantitative research is beneficial when examining a hypothesis or comparison with variables (Stanley, 2020; Yin, 2018;). Mixed-method research combines quantitative and qualitative approaches to facilitate understanding complex issues and achieve comprehensive findings (Fusch & Ness, 2015; Saunders et al., 2015; Stanley, 2020). Due to this research not involving hypotheses testing or comparison of variables, I did not use the quantitative research method. The qualitative research method was appropriate for my meta-analysis study.

The qualitative research method supported my research questions in this study and provided an in-depth, structural process with information on strategies and processes used by nonprofit leaders to maintain long-term organizational and financial health.

Research Design

I used a meta-analysis design for my study. Researchers conduct meta-analysis studies to explore experiences and motivations, which aligned with this study's focus on understanding the underlying factors contributing to success (Almalki, 2016; Yin, 2018). Regarding the research design, I specifically selected a meta-analysis study design as the most suitable approach for this research. Meta-analysis was chosen because it offered the means to create a foundation for socially constructed meaning, which was essential for addressing the study's purpose effectively (Almalki, 2016). While other design options such as a single case study or multiple-case study were contemplated, they were not selected because they might not have provided the comprehensive synthesis of existing research that the meta-analysis approach offers. The meta-analysis approach enables a broader and more generalizable perspective, allowing for a more comprehensive exploration of the subject matter (Yin, 2018). Research designs are vital for supporting a particular idea and addressing research questions (Guetterman & Fetters, 2018).

Qualitative research consists of alternative designs such as phenomenology and ethnography. Phenomenology and ethnography were not appropriate for my studies. Researchers use a phenomenology research design in a qualitative strategy process to identify a psychology and philosophy approached with a participant experience of a phenomenon, which did not align with the purpose of this study (Asenahabi, 2019).

Ethnography is a qualitative strategy process that focuses on anthropology and sociology of shared behaviors and languages of a particular cultural group (Asenahabi, 2019). Ethnography allows researchers to observe participants during real-life, direct observation (Asenahabi, 2019). Ethnography did not align with this study purpose due to me not interviewing participants directly.

Using a meta-analysis study enabled me to explore and answer the research question. A meta-analysis study allows a researcher to use qualitative research design as a way to describe the narrow scope as a limitation, as often appears in a discussion section (Alpi & Evans, 2019). According to Yin (2018), the meta-analysis approach enables a broader and more generalizable perspective, allowing for a more comprehensive exploration of the subject matter (Yin, 2018). Data collected enabled identification and exploration of successful strategies nonprofit leaders use to achieve long-term organizational health through financial change management. Triangulation of data from review of multiple published doctoral studies, continuous comparison of emerging patterns, and iterative refinement of meta-analysis guiding questions were among the pivotal strategies deployed for achieving comprehensive data saturation.

Population and Sampling

For this doctoral study, I adopted a purposeful sampling strategy, drawing from a selection of previously approved Walden University doctoral studies that share a common focus on achieving sustainability and long-term organizational health through financial change management. These studies were identified based on their relevance to the research problem, purpose, and conceptual framework of this investigation. To ensure

methodological soundness and alignment with the investigation's core objectives, a rigorous selection process guided by nine meta-analysis guidance questions was implemented.

The search initially covered studies from 2018 to 2023, focused on the need for effective strategies to maintain long-term organizational and financial health in the United States, and aligned with the research scope and specific quality criteria. Upon the initial screening, a tailored set of meta-analysis guiding questions was employed. These questions were designed to extract, scrutinize, and evaluate pivotal insights from the selected studies.

To facilitate this study, the Walden University Library provided a curated list of recently published doctoral studies completed by fellow students that aligned closely with the research problem, purpose, and conceptual framework of this inquiry. Although the current study did not involve direct participation of human subjects, I employed a meta-analytical approach to analyze and synthesize the results from these previous studies, contributing to the development of Section 3 within this doctoral research. Following Yin's (2018) guidance on establishing rapport with participants, this study effectively communicates the research rationale to all involved participants, ensuring clarity and understanding. Moreover, a comprehensive saturation of previous data was performed during the data analysis phase, until I determined that additional review of more published studies would probably not generate any more new information than what I uncovered already that could enhance the existing body of knowledge in this area.

Ethical Research

Manti and Licari (2018) identified the informed consent as documentation that is voluntarily expressed through a written, signed, and dated consent process for information. Informed consent is an ethical process for collecting personal data (Manti & Licari, 2018). Consent forms were not needed for this meta-analysis study because review of previously published resources was the basis for the study findings.

The Research Ethics and Compliance department at Walden University manages the IRB, which ensures ethical practices with research compliance at all levels such as university, state, and federal levels. Informed consent is verified through a formalized IRB application and vetting process. I secured IRB approval (#05-11-22-1084481) for this study to contribute, collect, and analyze data for leader interviews, public data and literature, and internal site documents and data (see Walden University, 2017). Initially, IRB approval was secured for a consulting capstone client study, but the client organization decided not to continue with the study agreement, so I reapplied for IRB approval under a meta-analysis study and was approved under the original approval number. To safeguard the confidentiality of selected organizations, I will utilize pseudonyms to protect their identities within this study.

Data Collection Instruments

In my capacity as the researcher for this qualitative meta-analysis study, I served as the secondary data collection instrument. In this role, I leveraged previously approved doctoral studies conducted by Walden University students. Following the guidance of Olabode et al. (2019), the use of a secondary data collection instrument in this study

served several purposes, including (a) identifying contemporary and historical attributes, (b) enabling comparative research or replication of the original research, (c) facilitating reanalysis, (d) contributing to research design and methodological advancement, and (e) supporting teaching and learning endeavors. In determining the inclusion of previously approved doctoral studies, I utilized Walden's online database as a primary resource. The selection process involved employing nine meta-analysis guiding questions (see Appendix) to discern studies that aligned with the systematic, purposeful, and meaningful exploration required for my research. The utilization of these guiding questions facilitated a meticulous evaluation to ensure the relevance and appropriateness of the selected studies.

In addition to these guiding questions, I incorporated the Baldrige Excellence Framework into the study, aiming to create a comprehensive understanding of assessments and analysis within seven key domains: (a) organizational profile; (b) leadership; (c) customer relationships; (d) measurement, analysis, and knowledge management; (e)workforce; (f) operations; and (g) results of processes and products. To enhance the reliability and validity of the data collection instrument and process, I employed a range of techniques, including triangulation, ethical considerations, considerations of transferability and dependability, and a commitment to data transparency, drawing from the wealth of information available in the previously approved Walden University studies.

Data Collection Technique

In a meta-analysis study, the researcher harnesses previously collected data from other researchers to achieve a comprehensive and robust understanding of a specific research problem or question. Qualitative meta-analysis studies are unique in that the researcher serves as the secondary instrument, responsible for describing, explaining, and accurately documenting the data from primary data collected while collectively synthesizing it (P. Fusch et al., 2017; P. Fusch & Ness, 2015; Gunnerson, 2019; Marshall & Rossman, 2016; Yates & Leggett, 2016). In conducting the meta-analysis, several meticulous steps were integral to the process.

Initially, I meticulously navigated through the Walden Online database, aligning with Noble and Heale's (2019) recommendations. This deliberate approach not only broadened the spectrum of available studies, but also facilitated the verification of data accuracy and reliability. Employing the principles of triangulation, as advocated by Harrison et al. (2017), aided in mitigation of potential biases, given the utilization of diverse data sources.

The selection of studies for inclusion was a meticulous process aimed at ensuring comprehensive coverage while maintaining relevance to the research objective. Following a systematic approach, I initially sieved through studies that matched the research scope and adhered to specific quality criteria. Once this initial curation was completed, I implemented a customized set of meta-analysis guiding questions. These specifically crafted questions played a pivotal role in extracting, scrutinizing, and evaluating pivotal insights present within the selected studies. The application of these

guiding questions facilitated the synthesis and in-depth analysis of the amassed data, ultimately contributing to the formulation of comprehensive and substantial conclusions.

However, while this data collection technique offered broad access to diverse sources and facilitated the application of rigorous quality criteria, it also presented certain limitations. For instance, reliance on existing studies may have restricted access to specific data elements or introduced biases inherent in the original studies. Nonetheless, integrating ethical considerations, contemplation transferability, and dependability, and maintaining unwavering commitment towards reinforcing the robustness of the findings significantly contributed to the overall rigor and credibility of the research.

Data Organization Techniques

Microsoft Word and an online research folder were the two tools I employed to organize data for this study. Microsoft Word was used for identifying common themes among previously approved Walden doctoral studies. In addition to Microsoft Word, I employed an online research folder as an essential tool to facilitate efficient data organization for this study. The online research folder allowed me to store, categorize, and access data collected from various previously approved Walden doctoral studies. This approach was particularly useful in ensuring that I could easily cross-reference and retrieve relevant information, streamlining the synthesis of data from multiple sources. As highlighted by esteemed scholars such as Gerrish et al. (2017) and Ullmann et al. (2019), the strategic utilization of these tools and databases is paramount in the realm of research. It not only facilitates rigorous data analysis but also substantially decreases the likelihood

of data misinterpretation due to errors. Consequently, it underscores the commitment to maintaining data integrity, a fundamental aspect of rigorous academic research.

As the principal custodian of the data collected in this study, I bear the responsibility of ensuring its accuracy and preservation in accordance with the highest organizational protocols. All electronic files generated will be meticulously stored on a password-protected computer, with exclusive access granted solely to me. Additionally, secure hard drive storage was employed to safeguard against data loss or compromise. This stringent approach to data management aligns with the robust standards upheld in academic research, reinforcing the credibility and reliability of the study findings for the next 5 years.

Data Analysis

As the researcher for this qualitative meta-analysis study, I played a crucial role as the secondary data collection instrument. The study focused on identifying and exploring the successful strategies that nonprofit leaders employ to achieve long-term organizational health through financial change management. In the data analysis process, I employed methodological triangulation, which involved finding similarities across various sources, including approved doctoral studies conducted by Walden University students. Triangulation allowed me to pinpoint common themes in these studies (Battaglio & Hall, 2018; Yin, 2018). To collect data from these previously approved doctoral studies, I accessed existing databases and applied nine guiding questions designed for meta-analysis. By doing so, I followed the practice recommended by Smith (2018), which involves data triangulation to ensure the richness and validity of the

research. In addition to these guiding questions (see Appendix). I integrated the Baldrige Excellence Framework into the study to achieve a comprehensive understanding.

For data analysis, I employed Yin's thematic analysis method to identify common themes within the data extracted from the approved research (Yin, 2018). I compiled selected relevant studies in a Word document, extracting data and resources, including research guiding questions and images, that were pertinent to my research question. In the context of a qualitative meta-analysis, my role was to aggregate and synthesize findings from the primary qualitative studies, aiming to interpret and develop new insights and theories. This process involved comparing findings and themes across the primary studies, ultimately contributing to a deeper understanding of my research question. I correlated the key themes–process strengths, process opportunities, results strengths, and results opportunities–with both the existing literature and the conceptual framework of GST. This correlation was achieved through the extraction and meticulous analysis of patterns evident in my meta-analysis. I evaluated how these identified themes aligned with the conceptual framework of GST by critically analyzing previous studies. This evaluation ascertained the resonance between the emerging themes and the guiding conceptual framework of my research.

Reliability and Validity

Reliability

In the realm of qualitative research, the concept of reliability assumes a pivotal role in enhancing the overall trustworthiness of a research endeavor. Reliability, in this context, pertains to the consistency and dependability of the entire research process and

its resulting findings (Bougie & Sekaran, 2019). Dependability, a critical facet of reliability, ensures that the methods, procedures, and data collection techniques used in my research will be consistent and dependable, leading to trustworthy and replicable results. As the custodian of data in my role as the secondary data collection instrument for this meta-analysis study, it was imperative to conduct the data retrieval process with the utmost rigor and trustworthiness. To achieve this, various methodological approaches were employed. One such approach entailed the systematic access of pre-existing databases, along with the application of nine guiding questions meticulously tailored for the purposes of meta-analysis. In adopting this methodology, I adhered to established best practices, as recommended by Smith (2018), thereby implementing data triangulation to enrich the quality and validity of the research. Furthermore, the integration of the Baldrige Excellence Framework into the study was undertaken to obtain a holistic and comprehensive understanding of the subject matter.

A paramount aspect of maintaining consistency throughout the study was the implementation of data extraction processes in relation to the previously approved doctoral studies. This meticulous extraction process ensured that data was treated uniformly, thus providing a systematic and standardized approach to data processing. Notably, data extraction was instrumental in bolstering the research's methodological triangulation by validating data against alternative sources, thereby aligning with the insights of Noble and Heale (2019) and Yin (2018). In the context of my qualitative meta-analysis research, reliability takes on a pivotal role by instilling trust in the data gathering process. This trustworthiness is underscored by the prevention of undue

research bias or subjectivity. Through this rigorous approach to data collection, my research endeavors stand as a testament to the tenets of reliability in qualitative inquiry.

Validity

In the context of qualitative research, the concept of validity holds paramount significance, as it directly pertains to the researching ability to provide accurate and trustworthy insights derived from data collected in previously approved primary studies. The notion of validity is particularly crucial within the domain of qualitative meta-analysis research. According to Bougie and Sekaran (2019), validity encompasses both internal and external facets. Internal validity places a strong emphasis on the rigor of methods employed, focusing on the process and the dependability of the research findings. External validity pertains to broader concerns related to the generalizability of findings beyond the scope of the primary studies, a vital aspect evident in my meta-analysis.

To ensure the research validity, I diligently adhered to established best practices, as recommended by Smith (2018). Specifically, I incorporated methodological triangulation to enhance the quality and overall validity of the research. This approach involved cross-referencing a combination of using existing Walden studies and using the Baldrige framework to ensure a well-rounded and robust perspective. In addition to these data collection techniques, my research was fortified by ethical considerations, an unwavering commitment to transferability, and dependability, all of which collectively contributed to the research rigor. These elements were carefully interwoven into the study to further bolster the reliability and trustworthiness of the findings. Valid research

practices within a qualitative meta-analysis laid the foundation for credible and solid conclusions, enabling meaningful contributions to the study's body of knowledge. Triangulation of data from review of multiple published doctoral studies, continuous comparison of emerging patterns, and iterative refinement of meta-analysis guiding questions were among the pivotal strategies deployed for achieving comprehensive data saturation.

Transition and Summary

In this qualitative meta-analysis study, I explored strategies nonprofit organizations' leaders use to maintain long-term organizational and financial health. In Section 2, I outlined the overall proposal for my doctoral study, restated the study of the purpose, role of the researcher, and identified the participant pool. Furthermore, I comprehensively analyzed research methods, design, population, sampling, ethical principles, data collection instruments, data collection techniques, data organization technique, and data analysis.

In Section 3, I used the 2017-2018 Baldrige Performance Excellence Framework to conduct an in-depth review of my client organization. I focused on several topics, including (a) organizational profile; (b) leadership; (c) customer relationships; (d) measurement, analysis, and knowledge management; (e) workforce; (f) operations; and (g) results of process and products. I concluded Section 3 by providing ae summary of key findings, project summary, contributions, and recommendations for future research.

Section 3: Organizational Profile

In the meta-analysis conducted, specific focus was directed towards nonprofit entities situated within the geographical regions of the mid-Atlantic and the west coast of the United States. The doctoral studies selected adhered rigorously to predefined research criteria tailored to investigate the inquiry: "What strategies do nonprofit leaders use to support financial change management in an organization for sustainability?" These chosen studies centered on nonprofit organizations grappling with the complexities of navigating uncertain resource landscapes. Each of these organization leaders actively pursued avenues conducive to long-term organizational and financial viability, encompassing sustainable funding streams derived from various sources such as earned income, government allocations, grants, philanthropic donations, and investment returns. Ultimately, the analysis uncovered the three overarching themes: robust communication and stakeholder engagement, mission alignment and dedication, and a steadfast dedication to a culture of continuous improvement and learning.

Key Factors Worksheet

Organizational Description

The six doctoral studies chosen for my meta-analysis were organizations within the nonprofit sector, registered as 501(c)(3) in the mid-Atlantic, Pacific Northwest, and west coast region of the United States. The six selected organizations provided a learning-centered standard for excellence. The organizations are advocates for social responsibility including lifelong learning opportunities for success and growth. These meticulously selected organizations exemplified a commitment to a pedagogical

paradigm centered on fostering excellence. Their advocacy extended towards championing social responsibility, advocating for continual learning opportunities pivotal to sustained success and advancement. The organizations inclusively focused on core competencies such as equal rights, self-development, empowerment, education, and a community-based approach.

Organizational Environment

Product Offerings. Each organization was purposefully established with unique missions, delineated into advocating for digital information technology, promoting lacrosse programming, and facilitating ongoing developmental initiatives. The products and services offered by these entities encompassed a diverse range of activities:

XYZ. This initiative was primarily geared towards furnishing comprehensive digital IT solutions, specifically tailored to enhance accessibility, comprehension, and opportunities for individuals with visual impairments, blindness, or print disabilities. Through a wide spectrum of services, including customized training programs catering to both corporate entities and end-users nationwide, the organization leaders aimed to augment the accessibility and usability of digital platforms for individuals with various disabilities.

TZA. This program focused on supporting athletic endeavors in lacrosse specifically tailored for elementary and middle school students situated within Baltimore City. Its principal objective revolved around extending financial and transportation support to girls attending five specified schools in the region. With approximately 10 clinics held annually at various high schools, the program not only offered sports

training, but also provided year-round academic tutoring and life-enriching experiences. Moreover, it facilitated enduring mentorship opportunities with high school and college lacrosse players within the local community.

ABC. This organization encompassed initiatives dedicated to the continuous development and support of children. It comprised a nurturing parenting program aimed at mitigating parental risk factors associated with abuse and neglect. Additionally, it encompassed case management services dedicated to identifying stressors and issues within familial and housing environments, an employment development program offering on-the-job training in the retail sector, and transportation services tailored to provide personalized door-to-door assistance meeting client requirements. Collectively, these programs aspired to foster comprehensive growth and aid for individuals within the community.

ASD. ASD Foundation is an institution committed to the comprehensive management of critical incident stress (CISM) through a diverse array of educational programs and support services. By offering a wide spectrum of traditional and online courses, providing scholarships tailored for first responders, and facilitating a global forum, its primary aim is to equip professionals in emergency services, healthcare, and allied sectors with specialized training. The foundation's extensive reach is empowered by a global cadre of over 1,000 endorsed instructors, delivering 49 courses that not only provide continuing education credits, but also contribute significantly to professional certifications. Its strategic initiatives, including specialized training certification programs such as the Approved Instructor Candidate Program, coupled with essential support

services such as an emergency hotline and memberships, underscore its commitment to the field. Furthermore, the ASD Foundation serves as a pivotal knowledge hub within the CISM community, disseminating crucial updates and information through publications like LifeNet and CISM Wisdom, solidifying its role as a central resource hub for crisis intervention and management education.

MDM. The nonprofit organization's leaders orchestrate an array of programs aligned with its core mission of reducing material consumption and waste while concurrently educating the local populace. These initiatives include the K12 Curriculum Design and Educational Outreach Initiative, which conducts seminars and presentations targeting diverse audiences such as students, consumers, and grocery shoppers. Another pivotal program, the Reuse to Reduce Directory, operates as an online platform facilitating the exchange of preowned goods through local businesses and nonprofits. This directory offers consumers opportunities to purchase, sell, or trade used items as an alternative to acquiring new products. Additionally, the LITE Life Guide imparts practical daily tips to assist individuals in embracing zero waste principles in their lifestyles. Complementing this guidance, the LITE Lines e-newsletter disseminates comprehensive information regarding zero waste practices within the community. The organization's educational efforts extend to the popular Grocery Shopping Tours & Presentations, aimed at enlightening consumers on mindful packaging choices and informed shopping practices. Formerly involved in managing zero waste/recycling initiatives at a major community street fair, the organization has presently suspended its involvement in greening public events.

ERO. ERO, mandated by its funders, provides five core services including information and referral, system change advocacy, independent living skills, peer support, and transition services. Its free program encompasses individual advocacy, assistive technology coordination, benefits planning, peer counseling, housing resources, and more, catering to individuals regardless of disability or background. Advocacy efforts focus on empowerment and policy influence for accessibility, while assistive technology aids in various accessibility improvements. ERO assists with benefits applications and preserves and expands benefits for the disabled. It fosters community bonds through peer counseling and addresses housing, independent living skills, and transition needs. Operating two social enterprises generating revenue, ERO seeks to integrate these effectively within its service segment, an area the leadership aims to develop systematically.

Mission, Vision, and Values. The organizations under consideration staunchly advocate for social responsibility while striving to fortify enduring organizational and financial well-being through the establishment of lifelong learning opportunities conducive to success and advancement. Their mission fundamentally revolves around nurturing sustained organizational health and longevity, encapsulating overarching objectives and pioneering strategies. Central to their mission are pivotal components of strategic planning, comprising target clienteles, principal product offerings, geographic scope, foundational technologies, dedication to expansion, underlying philosophy, self-perception, and the desired public image.

Their vision centers on comprehending the intricate process of business–nonprofit engagement vital for sustaining financial management. This vision is realized through strategic partnerships aimed at ensuring seamless resource integration and bolstering organizational value. Serving as a guiding beacon, the vision embodies a comprehensive outlook encompassing core ideologies, values, purpose, and future trajectories. Foremost among the organization's goals is the aspiration to inspire, attain, and firmly establish financial sustainability and enduring organizational vitality.

The organizations' values are firmly rooted in fostering inclusivity, emphasizing core competencies such as equal rights, self-enhancement, empowerment, education, and community-centric initiatives. This approach serves as a conduit for the introduction of innovative services, thereby contributing significantly to the sustained growth of these entities. By delineating a lucid and aspirational trajectory, these values play a pivotal role in charting a course for the organizations, guiding them towards the fulfillment of their mission.

Workforce Profile. The diverse array of workplace profiles analyzed unveils distinct thematic elements defining each organization's approach, values, and operational structures (see Table 1). Organization XYZ**,** for instance, exhibits an unwavering commitment to accessibility, boasting a predominantly disabled workforce adept in adaptive technology, aligning with their emphasis on achieving International Association of Accessibility Professionals (IAAP) Certified Professional in Accessibility Core Competencies (CPACC) certification. TZA prioritizes education, fostering a nontraditional environment where all senior leaders hold bachelor's degrees, emphasizing

mentorship and coaching while operating from client leaders' residences. Additionally,

the emphasis on diversity and inclusivity stands out prominently within XYZ and ERO,

where accommodating individuals with disabilities remains a central focus. ERO, bound

by a federal mandate, maintains at least 50% disabled employees, embodying a deliberate

effort to resonate closely with the served community. Meanwhile, ABC's extensive

program diversity positively influences families and individuals through community-

driven support services. ASD Foundation's lean core team oversees a vast network of

independent faculty, while MDM relies on a founder and a small board of directors

(BOD), encountering workforce stability challenges due to its all-volunteer nature. These

profiles underscore commitments to accessibility, education, community engagement,

and impactful service delivery, reflecting the challenges and strategic orientations unique

to each organization's operational landscape.

Table 1

Workforce Profile

Organization	Key characteristics
XYZ	Predominantly disabled workforce adept in adaptive technology; emphasis on achieving IAAP CPACC certification; commitment to accessibility and expertise
TZA	All SLs hold bachelor's degree; promotes mentorship, tutoring, and coaching; operates from client leaders' residences; nontraditional workplace environment
ABC	Offers diverse program portfolio aiding families and individuals through community-driven support services
ASD	Lean core team overseeing a vast network of independent faculty
MDM	Relies on a founder and a small BOD; workforce stability challenges due to its all-volunteer nature
ERO	At least 50% disabled employees due to federal mandate; deliberate effort to resonate closely with served community; emphasizes diversity and inclusivity

Assets. The assets across the various entities exhibit diverse compositions, encompassing tangible, intangible, and community-oriented resources crucial for their operational vitality and societal impact. Firstly, XYZ's assets primarily comprise equipment and technological infrastructure, notably showcased by the replacement of an outdated website, reflecting a strategic investment in digital assets. Contrastingly, TZA values the knowledge base of its workforce and leverages equipment procured through

fundraising, donations, or loans to deliver lacrosse programming, highlighting both

intellectual and physical assets. In a community-oriented context, ABC's thrift store

stands as a key asset providing work experience and education materials, aligning assets

with community needs. Additionally, ASD Foundation's assets are rooted in financial

reserves and technological infrastructure, particularly the website and backend database,

which serve as pivotal tools for marketing, information dissemination, and credibility

enhancement within the crisis intervention field. Meanwhile, MDM's assets pivot towards

proprietary presentations and office supplies, adapting to virtual operations due to

pandemic constraints. ERO's assets predominantly feature colleagues, reputation,

strategic technology upgrades facilitated by grants, and facilities well-suited for their

expanding programming, signifying assets aligned with community needs and

technological advancements. Collectively, these diverse assets underscore the importance

of physical, technological, knowledge-based, and community-oriented resources,

essential for operational efficacy, service delivery, and adaptability across varying

organizational contexts.

Regulatory Requirements. The regulatory landscape governing the operational

paradigms of nonprofit entities, including XYZ, TZA, ASD Foundation, ABC, MDM,

and ERO, manifests through a spectrum of mandates and guidelines encapsulating federal

tax-exempt status and state-specific regulations. Embracing the 501(c)(3) tax-exempt

status, these organizations navigate a stringent regimen, compelling annual IRS Form 990

filings for financial transparency and adherence to federal tax codes. State jurisdictions

exert their influence, delineating distinct compliance requisites; XYZ in New York

conducts obligatory annual audits, while ABC in California adheres to state labor standards and OSHA guidelines. Ensuring financial transparency, all entities rigorously embrace internal governance tenets, encompassing bylaws, conflict of interest policies, and ethical guidelines. Moreover, grant-funded entities, exemplified by ERO, maintain strict vigilance, aligning operational milestones with grant funding prerequisites through meticulous audits. Collectively, these nonprofit organizations exemplify a commitment to adherence, navigating a multifaceted regulatory terrain spanning federal tax mandates, state-specific directives, financial transparency imperatives, internal governance frameworks, and grant funding compliance, ensuring operational integrity and ethical conduct within their distinct operational realms.

Organizational Relationships

Organizational Structure. The examined nonprofit entities reveal diverse organizational structures and governance frameworks. XYZ adopts a conventional hierarchical model, currently with a dormant board but actively pursuing legal and marketing expertise to catalyze growth, aligning with Whitler et al.'s (2018) findings on the potential impact of specialized board expertise on revenue strategies and strategic priorities. TZA Company leaders emphasize shared responsibilities among clients, SLs, and volunteers within their organizational structure, while ABC functions sans a local governing board, relying on decisions at the local level by cofounders and executive directors. In contrast, ASD Foundation leaders boast an actively involved governance structure, comprising an informed board and chairman, ensuring robust oversight and strategic direction. MDM is overseen by its founder and a limitedly active five-member

board, impacted by disruptions due to the pandemic. ERO's governance structure involves a 10-member advisory board guiding the leadership team, reflecting varied approaches to decision-making dynamics, board engagement, and adaptability to external disruptions among these nonprofit organizations.

Customers and Stakeholders. Across these diverse organizations, key themes emerge in their approaches to engaging customers and stakeholders. Firstly, a significant emphasis lies on the diversity of their clientele, spanning from educational institutions, corporate entities, and government agencies to specific communities like individuals with disabilities and emergency response professionals. Secondly, a common thread is their commitment to advocacy and outreach efforts, evident in initiatives for digital inclusivity, community support, and specialized training programs. Service delivery stands as another crucial aspect, encompassing educational, advocacy-based, and community-oriented services, including zero-waste initiatives and work experience provisions. Moreover, maintaining robust relationships with stakeholders is a shared priority, ranging from donors, suppliers, and collaborative partners to the workforce, yet some organizations lack a clear strategy to monitor these relationships effectively. Demonstrating adaptability, these organizations show a keen readiness to pivot services to meet evolving customer and stakeholder needs, particularly in program growth and community-driven endeavors. Ultimately, their collective focus underscores the commitment to making a tangible impact on communities through varied educational, advocacy, and support programs.

Suppliers and Partners. The depiction of supplier and partner relationships across these organizations unveils several prevalent themes (see Table 2). Collaboration stands as a cornerstone for most, as seen in XYZ's active engagement with nonprofit organizations, government entities, and international bodies. The emphasis placed by these partners on XYZ's adherence to their mission, vision, and values (MVV), transparent practices, and being a knowledgeable resource for digital accessibility underscores the expectations set forth by these partnerships. XYZ's adept understanding of ADA and WCAG guidelines enables the sharing of expertise and facilitates societal influence. Maintaining credibility through constant scrutiny of environmental changes and open communication avenues like meetings, calls, and emails are central to fostering innovation and effective collaboration.

Similarly, TZA Company, ABC, ASD Foundation, MDM, and ERO highlight the pivotal role of suppliers and partners in their operations. The significance of these collaborations resonates through their ability to sustain programs, foster innovative approaches, and support organizational goals. Close ties are maintained through scheduled meetings and consistent communication efforts. These entities express their reliance on key suppliers and partners, encompassing various stakeholders, major department stores, community donors, and community leaders, highlighting the pivotal role played by these collaborations in serving both external and internal customers. Moreover, the need for structured communication, seeking best practices, and formalized collaborations is evident across these organizations, demonstrating a collective push for stronger, more efficient partnerships. However, challenges like declining funding from

key partners or the lack of a comprehensive process to track learnings and their impact

pose significant areas for improvement and strategic consideration in their collaborative

endeavors.

Table 2

Key Collaborators, Partners, and Suppliers

Organization	Suppliers/key partners	Influence on organizational systems	Influence on innovation and competitiveness
XYZ	Nonprofit orgs., govt. entities	Adherence to MVV, transparency, knowledgeable resource	Expertise sharing, societal influence, adherence to guidelines
TZA	Suppliers supporting programs and donors; Lacrosse-related organizations	Sustaining programs, fostering innovation, supporting goals	Consistent communication, reliance on partners, communities
ABC	Major department stores, community donors	Support for organizational mission and sustainability	Collaboration-driven innovation, community engagement
ASD	Community donors, community	Program support, innovation, educational initiatives	Structure partnerships, reliance on suppliers, community ties
MDM	Community, govt. entities, schools, community businesses	Program support, educational initiatives, innovation	Community ties, collaboration-driven innovation
ERO	Local healthcare, local service provider	Healthcare initiatives, program support, innovation	Collaboration-driven, community engagement, reliance on partners

Organizational Situation

Competitive Environment

  Competitive Position. The examination of competitive positioning across XYZ, TZA Company, ABC, ASD Foundation, MDM, and ERO reveals multifaceted dynamics. XYZ's competitive edge lies in manual accessibility testing, pivotal for ADA WCAG compliance. While XYZ leaders believed they faced no direct competition in the nonprofit sector, research revealed Knowability Incorporated offering similar services. Seeking collaboration with for-profit entities emerged as a strategy to amplify societal advocacy for digital inclusivity. Conversely, TZA Company competes with large youth sports organizations, leveraging stakeholder relationships for innovative coaching methods. ABC faces local competition from a church, impacting its community service outreach. In contrast, ASD Foundation and MDM note their unique offerings, facing limited direct competitors in their respective fields of critical incident stress management and zero waste initiatives. ERO's landscape presents a nuanced scenario, involving collaboration among peer agencies, vying for government grants and donations. Despite not perceiving direct competition, ERO competes for funding sources with entities like United Way. Challenges across these organizations involve the lack of systematic processes to track outcomes, align efforts, or maintain core strengths, indicating room for strategic enhancements in navigating their competitive environments.

  Competitiveness Changes. Synthesizing the competitive changes across several organizations offers a comprehensive view of their adaptive strategies. XYZ leaders meticulously track technological advancements to preserve its digital accessibility

mission and evaluates the impact of funding fluctuations. TZA Company leaders strategically align its services with evolving youth needs, considering shifts in lacrosse-based programs and community barriers. Similarly, ABC Company responds to facility constraints while adjusting strategies based on competitor movements. ASD Foundation leaders restructure CISM management, alters revenue sources, and broadens outreach through a peer-reviewed journal. MDM grapples with fallout from the COVID pandemic and relies heavily on fluctuating funding sources. Conversely, ERO navigates the intricate landscape of government grants, explores new revenue avenues like braille services, and adapts to changes in healthcare funding, amid ongoing uncertainties in the external environment. These diversified approaches underscore the complex strategies and adaptive measures undertaken by each organization to sustain and evolve within their competitive landscapes.

Comparative Data. Gathering comparative and competitive data for these nonprofit organizations presented considerable challenges due to several factors. For XYZ, the uniqueness of their manual usability testing service, provided by both XYZ and Knowability Incorporated, posed obstacles in accessing comparative data, especially considering that for-profit organizations offering similar services withhold proprietary information. TZA Company faced challenges in data collection due to its size, exploring information from various lacrosse associations and youth programs, relying heavily on social media and organizational websites for insights. Conversely, ABC Company leaders encountered obstacles in accessibility to comparative data specific to its location, resorting to information available from other locations of the same brand. ASD

Foundation leaders obtained valuable insights from organizations like Maryland VOAD and Maryland Nonprofits, utilizing these memberships to share information and resources among similar organizations. MDM struggled to find published comparative data due to its recent establishment and limited scale compared to larger nonprofits. Similarly, ERO leaders faced hurdles in creating a comparative dashboard due to variations in service implementation across its 28 centers, compounded by differing government grants tailored to each center's unique needs. While some efforts to gauge performance exist, such as client satisfaction surveys, the absence of a systematic quantitative analysis inhibits a comprehensive understanding of trends and data for ERO.

Strategic Context. The strategic context across various nonprofit organizations encompasses multifaceted challenges and opportunities. Technological advancements, observed by XYZ's senior leaders, present a dual-sided scenario where innovation positively influences digital accessibility while potentially altering the future landscape of their product offerings. Simultaneously, managing a dispersed geographical workforce emerges as a challenge affecting strategic planning, engagement, and operational efficiency, albeit perceived as an opportunity to advocate on a broader scale. TZA and ABC leaders grapple with strategic challenges, including sustainable donor acquisition, volunteer retention, and expanding services, juxtaposed with advantages such as reputation, partnerships, and fostering loyal donors. ASD Foundation and ERO navigate challenges tied to organizational structure, business development, and financial sustainability while leveraging established processes and nurturing approaches as their key assets. The financial sustainability conundrum resonates across MDM and ERO,

highlighting their reliance on donations, grants, and volunteer support for operational growth. Lastly, the absence of a well-defined strategy at ERO underscores the need for a more structured approach to sustain improvements and engage stakeholders effectively. These themes underscore the intricate interplay of technology, workforce dynamics, strategic planning, continuous improvement, and financial stability, advocating for adaptive strategies and sustainable funding in the dynamic landscape of nonprofit organizations.

Performance Improvement System. The assessment of performance improvement systems across the featured nonprofit organizations unveils multifaceted approaches and challenges within the sector. Primarily, a divergence between informal and structured evaluation mechanisms is evident. Organizations like XYZ predominantly rely on informal feedback loops derived from customer interactions and referral rates, while entities like TZA embrace more structured cycles such as the Plan-Do-Check-Act (PDCA) model to rigorously monitor and refine their performance. Regular meetings, a shared practice among these organizations, serve as conduits for idea exchange, strategy formulation, and individual performance enhancement. However, resource limitations, notably constrained human capital and financial scarcity, pose significant barriers to establishing robust systems, as observed in ERO, where limited resources hinder the effectiveness of their performance systems. There's a discernible need across these organizations for more holistic systems that blend financial and nonfinancial metrics aligned with organizational objectives, a void currently faced by entities like MDM. The approaches adopted by these nonprofits span diverse strategies, including customer

feedback analysis, morale assessment, technological leverage, and exploration of new funding avenues, indicating a landscape of varied methodologies tailored to organizational contexts. Furthermore, a prevailing emphasis on continuous learning and improvement is observed, evident in organizations like TZA and ASD Foundation, where a culture of learning through technology upgrades, leadership-board interactions, and experimentation underscores their pursuit of positive change within the constraints of the nonprofit environment.

Leadership Triad: Leadership, Strategy, and Customers

Leaders play a crucial role in shaping organizational culture, performance improvement, and resource management within nonprofit organizations. Leaders have utilized the Malcolm Baldrige performance excellence model to foster sustainability and understand management as a total system (Jaskyte, 2004; Kast & Rosenzweig, 1972; Tettey, 2019). This model empowers leaders to align employee efforts with desired organizational outcomes, enhancing internal and external factors' impact on long-term organizational health (Vincent & Marmo, 2018; Wang, 2022). Effective leadership strategies, such as optimizing human and financial resources, are essential for organizational success (Lower & Czekanski, 2019; Masaldzhiyska, 2019). To underscore the significance of leaders' adoption of the Malcolm Baldrige performance excellence model, it is essential to recognize leader commitment to sustainable practices and comprehensive organizational management (Jaskyte, 2004; Tettey, 2019). As I explored the critical role of leadership within nonprofit organizations and nonprofit utilization of the Malcolm Baldrige performance excellence model, it became evident that leaders who

prioritize these principles gain a competitive advantage. In the following discourse, I will highlight the centralization of optimizing human resources and managing resources strategically for pivotal aspects of effective nonprofit leadership.

Leadership

Senior Leadership

The senior leadership at XYZ embodies a profound commitment to digital inclusivity and equality, stemming from the personal experiences of the F/CEO, who navigated challenges due to vision loss and inaccessible digital systems. This collective experience fuels their dedication to integrating the organization's vision into every facet, striving to lead by example. Upholding an unwavering ethical stance, the leaders champion transparency, open communication, and ethical practices, evident in their agreements with external stakeholders and proactive legislative compliance. With a geographically dispersed workforce, effective communication channels, including digital platforms and personal interactions, are meticulously employed to ensure collaboration, garner insights, and recognize workforce contributions. Guided by a strategic vision, the leadership fosters growth by aligning near-term initiatives and long-term aspirations with the organizational mission, emphasizing the involvement of the entire workforce in decision-making processes. This commitment extends to the recognition of routine strategic planning as pivotal for steering the organization towards sustained growth and impact.

The senior leadership at TZA Company showcased a multifaceted approach, driven by key themes that underscored their commitment to organizational values, ethical

practices, stakeholder engagement, and sustainability. Their emphasis on aligning actions

with the organization's MVV was evident across various interactions, emphasizing ethical

behavior through formal agreements and proactive compliance efforts. Engaging diverse

stakeholders through open communication channels and platforms showcased a

dedication to fostering lasting relationships and empowering the community. Strategic

planning, continuous improvement, and a focus on actionable initiatives were pivotal in

ensuring organizational success and long-term sustainability. This concerted effort aimed

at empowerment, fundraising, and community engagement underscored the leadership's

commitment to transparent, impactful, and ethical practices, indicative of their

comprehensive approach to organizational management and development.

The senior leadership structure at ABC, consisting of the executive director,

bookkeeper, caseworkers, parenting and childcare facilitators, and an employment

development specialist, operates as a closely-knit team within the small nonprofit

organization. Communication within ABC is predominantly informal, adapting to

immediate needs, yet complemented by scheduled in-person meetings among key leaders.

Various communication channels, spanning traditional methods like letters to modern

platforms such as social media, illustrate ABC's efforts to engage stakeholders effectively.

With a focus on two-way communication, the organization solicits feedback to address

operational gaps, particularly in supporting their community initiatives. The leadership's

consistent and personalized interactions with customers highlight their commitment to

responsive engagement. Overall, these themes depict ABC's intentional approach to

cultivating a collaborative and communicative environment while engaging stakeholders to achieve community-oriented goals.

The evolution of the ASD Foundation stands as a testament to the strategic acumen and ethical stewardship of its leadership. Over the last 14 years, pivotal changes in leadership structure, especially the CEO's role, post-2009 ushered in a renewed emphasis on training and education, strategically guiding the organization's trajectory. The foundation's identity was meticulously crafted through the collaborative efforts of leadership and the board, anchoring vision and values in alignment with the organizational path. Notably, a robust emphasis on legal compliance was evident, marked by transparent financial reporting, stringent adherence to disclosure norms, and the assimilation of an extensive code of ethics aligned with the Maryland Nonprofits' Standards for Excellence Institute. Communication strategies were diversified, leveraging enhanced website features, various publications, and social media platforms to engage stakeholders effectively.

A deliberate focus on critical incident stress management underscored the foundation's core mission and strategic plans, harmonizing organizational objectives and actions. The organization nurtured an environment fostering success, deeply rooted in values such as financial independence and continuous learning, manifesting prominently in their meticulous transition from strategic planning to strategic management. Noteworthy international outreach initiatives, including translation efforts, international training programs, and collaborative ventures, showcased the foundation's expanding global presence. In essence, this encapsulates the multifaceted evolution of the ASD

Foundation, highlighting strategic, ethical, communicative, and global dimensions sculpted by the sagacious guidance and strategic vision of its leadership.

In the context of MDM organizational leadership, a paramount aspect lies in the visionary role of senior leadership, as underscored by the Baldrige Performance Excellence Program (2020). This pivotal cadre of leaders shapes and determines the trajectory of the organization through strategic planning, innovative foresight, and the articulation of a cohesive vision. Their stewardship sets the course for the nonprofit, serving as a guiding light that directs the entity toward its intended goals and objectives. This visionary function constitutes a cornerstone in establishing the organizational framework and aligning operational strategies with overarching goals.

Moreover, the founding member, holding a central position within the organization, exerts a significant influence on the ethos and fundamental underpinnings of the nonprofit. The founder's vision often delineates the organizational mission, shaping its core values, and instilling a sense of purpose that resonates throughout the entity's operations. This influence stems from the founder's comprehensive understanding of the organizational roots, thereby fostering a deep-seated connection to the nonprofit's mission and principles.

Furthermore, the distinctive leadership model within the nonprofit operates on a voluntary basis, highlighting a unique form of commitment that transcends conventional remuneration structures. This volunteer-centric leadership ethos symbolizes a profound dedication and passion toward the organization's objectives, fostering an environment

where leaders are propelled by intrinsic motivations and a collective commitment to the organizational cause.

Complementing this leadership paradigm is the strategic oversight provided by the BOD, consisting of five members. The Board assumes a critical role in steering the nonprofit's direction, offering governance, strategic guidance, and ensuring alignment with regulatory compliance. Their collective expertise and governance principles complement the visionary leadership, providing a checks-and-balances system that safeguards the organization's interests while enhancing its operational efficacy.

The leadership structure at ERO comprises crucial roles held by four key figures: the executive director, program manager, finance manager, and chair of the BOD. However, a notable gap exists in the organization's delineation of its vision and values, despite a recent update to the mission statement. This absence presents a challenge in effectively integrating the mission, vision, and values into the daily operations of the organization, hindering the comprehensive communication of strategic approaches to both internal and external stakeholders.

The recent adjustment to the mission statement aimed to encapsulate ERO's overarching commitment to advocating for a society free from barriers for individuals with disabilities. However, this amendment did not extend to defining a concrete vision and values framework for the organization. Consequently, there is an evident lack of clear definition regarding ERO's guiding principles. The senior leadership's perception indicates a belief that the mission statement inherently embodies the organizational

values, although this assumption may not sufficiently guide the intricate decisions and actions undertaken by the organization.

Critical to organizational coherence, the effective alignment of MVV stands as a pivotal factor. The need for a structured approach in articulating and integrating these foundational elements into the day-to-day functioning of ERO is evident. Such integration is imperative to substantiate and communicate the strategic directions adopted by the organization to internal stakeholders, employees, and external entities, thereby establishing a more cohesive and transparent operational ethos. Conclusively, the harmonization and effective communication of the MVV at ERO hold immense potential in guiding internal operations and fostering stronger relationships with stakeholders. Addressing these gaps presents an opportunity for ERO to solidify its strategic direction and operational framework in advocating for a barrier-free society for individuals with disabilities.

Governance and Societal Responsibilities

Within XYZ, a hierarchical structure governs the organization, led by the F/CEO, supported by a cadre of senior leaders collaborating collectively to ensure responsible governance. This intimate leadership circle maintains mutual accountability and aligns their actions with the organizational values, fostering a culture receptive to constructive criticism. Societal well-being remains the cornerstone of XYZ's operational ethos, exemplified by their advocacy for digital inclusion in the disabled community. The MVV profoundly influence XYZ's activities, emphasizing a commitment to social responsibility. Notably, the organization's efforts extend beyond advocacy, actively

contributing to enhancing digital accessibility, creating employment avenues, and fostering educational opportunities for individuals with disabilities. This commitment is further demonstrated through strategic collaborations with like-minded entities, aiming to address the challenges associated with disability inclusion.

The governance framework within TZA Company is structured around several critical themes. Firstly, the integration of senior leaders (SLs) within the BOD emphasizes strategic alignment and responsible oversight. Secondly, meticulous selection processes for BOD members, guided by TZA's MVV, contribute to a dedicated and diverse board composition. Quarterly BOD meetings serve as focal points for decision-making and assessment of governance effectiveness. Notably, SLs wield significant influence in BOD selections, employing comprehensive evaluations facilitated by an Executive Committee. Utilizing the PDCA cycle, TZA prioritizes internal and external audits for risk mitigation and goal assessment. Additionally, stringent ethical standards, despite the absence of formal ethics training, and adherence to federal IRS requirements for nonprofit status underscore TZA leader's commitment to legal compliance. The organization's ethos further involves embedding societal well-being, fostering ethical behavior, and actively engaging with the community, thus amplifying its societal impact and ethical standing.

The governance structure at ABC showcases several core themes crucial to its operational framework. Operating without a specific governance board, ABC leaders shoulder the responsibility for evaluating performance, making decisions grounded in evidence, and considering stakeholder input as paramount. Strategic alignment

predominantly resides at the executive director level, with other leaders aligning their endeavors to strategic plans and the organizational ethos, promoting a unified approach towards shared objectives. Regular leadership meetings encompass personnel, financial discussions, and community support, reflecting a proactive stance towards addressing health and safety risks related to their community services. Ethical behavior remains a cornerstone, with initiatives to implement grievance policies and uphold moral and professional standards. ABC demonstrates a steadfast commitment to social and environmental responsibilities, participating in events, collaborating with local entities, and contributing to community strengthening initiatives. Continuous improvement and stakeholder engagement form integral parts of their approach, marked by external audits, ongoing self-evaluation against organizational objectives, and active engagement with stakeholders to address evolving community needs. This commitment extends to a culture of mutual accountability, where leaders continuously self-monitor, engage in professional development, and foster an environment of support and improvement amongst themselves and stakeholders.

The governance framework at ASD Foundation embodies several key themes that define its operational structure and decision-making process. Governed by internally established by-laws in accordance with state corporation law, the foundation operates under the direction of its board, which convenes at least quarterly and holds authority to create an executive committee and other specialized committees. The board is vested with the power to appoint a CEO or executive director and exercises fiduciary responsibilities. Vacancies in board membership are systematically addressed, ensuring a continuous

governance structure. Additionally, regular meetings between the CEO and chairman facilitate timely discussions on foundation matters, supplementing the formal quarterly board meetings. Ethical conduct is underscored through a comprehensive employee handbook outlining the code of ethics, which serves as the foundation's guiding principles and grounds for dismissal if not adhered to, although exempting trained and approved instructors. Moreover, the foundation emphasizes societal well-being as a core element of its mission, offering extensive support to first responders and individuals affected by critical incidents. ASD Foundation's vision, values, and strategic plans deeply embed societal welfare, with the primary objective focused on nurturing the field of Critical Incident Stress Management (CISM). Community support further extends through the Academy of Crisis Intervention, providing comprehensive CISM training avenues to aid in coping with critical incident stress proactively and reactively. These governance themes collectively reinforce the foundation's commitment to ethical practices, community welfare, and the advancement of CISM initiatives.

MDM, guided by its founders and directors, is steered towards effective governance. Senior leaders champion ethical conduct and adherence to legal standards within the organization, aligning with the principles outlined by the Baldrige Performance Excellence Program (2020). Rooted in its mission and vision, MDM is committed to fulfilling its societal obligation by advocating for and educating the local community on zero waste practices.

The governance structure at ERO is led by a 10-member advisory board, overseeing strategic direction and governance, further supported by a four-member

executive committee. This board comprises professionals and clients, with at least half of its members representing individuals with disabilities. Monthly in-person meetings and occasional social media usage form the basis of their communication and oversight of the senior leadership managing ERO's operations. Participant interviews highlighted a potential for the senior leader to cultivate a more involved board, transforming from an advisory to a working board model, aiming for clearly defined objectives and actionable goals for stakeholders. Strengthening the strategic plan to outline specific tasks for the board could enhance overall organizational sustainability by diversifying revenue sources away from government grants. The senior leader adheres to ERO's by-laws, ensuring compliance with federal and state mandates while program offerings align with available funding. However, there's a noted lack of comprehensive tracking for funding levels and performance metrics, particularly concerning historical data for major grants. Moreover, formal processes to disseminate staff updates on performance, grant statuses, and financial performance are absent, with the senior leader sharing information on an informal basis.

Strategy

Strategy Development

Components and importance of strategic planning are the evolving challenges faced by businesses in day-to-day operations. Day-to-day operations have underscored the significance of effective strategic planning. A robust strategic plan encompasses specific endpoints that align with the organization's vision and mission. Hicks and Petrosoniak (2018) emphasized that strategic planning serves as a means for leaders to

enhance the organization's long-term outcomes. This plan involves a deep exploration of finance, financial goals, and financial performance, profoundly influencing the organization's leaders and managers.

Within XYZ, the utilization of strategic planning emerges as a crucial mechanism for fostering organizational sustainability and efficacy, aligning with the assertions made by Oschman (2017). This strategic approach empowers senior leaders to adeptly address the intricate challenges encountered within their operational landscape. By orchestrating structured responses to both internal and external dynamics, strategic planning cultivates an environment conducive to continual improvement and growth. Particularly within the nonprofit domain, this strategic pursuit holds paramount significance, enabling leaders to harmonize organizational goals with their broader mission, optimize resource allocation, and delineate pathways for substantive contributions to their sphere of influence. In essence, strategic planning operates as a guiding framework, enabling informed decision-making and actions aimed at fortifying the overall functionality and impact of the organization.

In the realm of TZA, strategic planning stands as the linchpin directing the organization's trajectory towards fulfilling its fundamental mission and strategic objectives. This inclusive planning process engages a diverse array of stakeholders, encompassing the workforce, customers, partners, and collaborators, convening regularly for scheduled meetings and discussions. Employing a structured approach, TZA's senior leaders meticulously conduct quarterly sessions that kickstart with a robust SWOT analysis, deciphering actionable insights and potential obstacles. At the heart of their

planning framework lies the alignment of the organization's overarching MVV with its core competencies, strategic challenges, and advantages, bolstering TZA's competitive edge and reinforcing participation in its lacrosse programming.

The adaptive nature of TZA's strategic planning dynamically responds to the evolving needs of the girls, constantly integrating shifts within their academic and athletic development. Crucial to this adaptive approach are feedback loops and a performance management system, ensuring constant alignment with stakeholder expectations and enabling swift adaptations to organizational, external, or competitive changes. Fostering a knowledge-sharing environment and leveraging innovative practices, TZA's leaders drive continuous improvement, ensuring they remain at the vanguard of emerging technologies and safety standards. Their central commitment revolves around nurturing and empowering girls through lacrosse, fostering holistic growth—academically, athletically, and personally—aligned intricately with the organization's core competencies and strategic intent. This unwavering dedication solidifies stakeholder commitment and propels the achievement of long-term goals.

At ABC, the absence of a formal strategic plan hasn't deterred the leadership's proactive approach towards goal setting and expansion. Engaging in regular weekly and monthly planning sessions, these leaders focus on outlining objectives and discussing plans for augmenting their programs to cater to a broader spectrum of families within the community. Short-term goals, such as enhancing walk-in traffic and introducing new programs, were delineated for the year 2020, accompanied by strategies including increased newspaper coverage and collaborative efforts to bolster program visibility.

Emphasizing the importance of client feedback, ABC leaders meticulously review and promptly follow up on received feedback to gauge the efficacy of their programs. Leveraging customer surveys as a catalyst for innovation, these leaders recognize the pivotal role of innovation in supporting their expansion aspirations, acknowledging the potential ramifications of stagnation on their growth trajectory. Despite operating within a non-technology-oriented environment, ABC strategically employs social media and newspaper advertising as networking platforms to remain abreast of emerging trends and avenues conducive to fortifying their expansion prospects.

In ASD Foundation's strategy development process, a structured approach underpins their strategic planning efforts, emphasizing the role of strategic planning in fortifying organizational sustainability and enhancing community service. Drawing insights from the scholarly work of Rana et al. (2017) and guidance from the National Council of Nonprofits (2018c), leaders and staff engage in comprehensive strategic planning sessions. Key stakeholders, including cofounders, board members, executives, and various departmental heads, collectively contribute to the formulation of strategic plans over designated periods, such as the 2009-2011, 2012-2014, and the more recent 2016-2018 Strategic Management Plans. These plans undergo meticulous assessments of internal strengths and weaknesses, external opportunities and threats, and customer demands. Emphasis is placed on setting clear objectives, establishing tactical strategies, and outlining specific tasks aligning with the core mission of nurturing the field of crisis intervention.

Furthermore, ASD Foundation's strategic journey illustrates an evolution from conventional strategic planning to strategic management. Notably, the 2016-2018 Strategic Management Plan adopted an innovative approach under the guidance of the CEO, incorporating direct inputs from staff and cofounders alongside comprehensive data analysis and SWOT assessment. This shift in strategy formulation facilitated a more inclusive and responsive plan aligned with the primary objective of advancing crisis intervention work. ASD Foundation's recognition of the evolving landscape drove a pursuit of innovative methods, particularly in leveraging social media platforms and technology tools like Google Ads and analytics to enhance visibility and training opportunities. The integration of these innovative approaches underscored significant growth in social media outreach and website traffic, potentially influencing increased training engagements.

Strategic objectives at ASD Foundation align directly with its mission and vision, emphasizing pre-incident education to address mental health concerns among first responders and laymen facing crises. Past strategic plans delineated focused objectives, emphasizing completion timelines and aligning strategic focus areas with specific goals, as witnessed in the development of an effective organizational structure. Moreover, the transition from strategic planning to strategic management brought a sharper focus on task execution and departmental action plans, emphasizing logistics, marketing, and project management within ASD Foundation's strategic framework.

The organization's strategic direction aligns with the notion that a vision forms the cornerstone for strategic goals and actions (Baldrige Performance Excellence Program,

2020). MDM, a nonprofit operating in the Pacific northwest region, champions zero waste education, providing crucial resources to regional stakeholders. Emphasizing strong guiding principles, the organization has defined its MVV, while concurrently fostering a culture that upholds accountability, encourages innovation, and advocates intelligent risk-taking (Baldrige Performance Excellence Program, 2020).

The strategy development process navigates leaders through the future trajectory of an organization, as highlighted by Baldrige Performance Excellence Program (2017). This multifaceted process encapsulates the delineation of acceptable risk thresholds within the business model, resource allocation, and overall decision-making, all harmonized with the organization's mission, vision, and values. Evaluating short-term and long-term objectives, both financial and non-financial, forms an integral part of this strategic journey. Leveraging the BSC framework empowers leaders within ERO to seamlessly integrate a comprehensive strategy, guided by the tenets of the Baldrige performance excellence framework.

Strategy Implementation

Strategy implementations encompass the transformative impact of strategies on organizational goal achievement. This process demands the translation of strategic objectives into actionable plans, necessitating resources, performance metrics, plan alignment, and procedural consistency within the organization (Baldrige Performance Excellence Program, 2017). Engaging key stakeholders, including managers, employees, customers, and suppliers, becomes imperative to foster commitment, cooperation, and collective support towards these objectives (Oschman, 2017).

The actionable plans at XYZ span both short and long-term horizons, covering a broad spectrum from fostering certifications and global hiring to enhancing partnerships and advocating for policy changes. The senior leadership at XYZ undertakes diverse evaluations and reviews of these plans, frequently discussed during staff meetings, striving to balance growth initiatives, reorganization, and resource allocation. Budget management emerges as a critical element, with the CEO ensuring adequate funding while prioritizing good financial governance amidst organizational expansion. XYZ's workforce expansion necessitates the formalization of HR policies to facilitate effective personnel management. Performance measures, captured through KPIs, guide their progress assessment, enabling necessary revisions to bolster outcomes and resource optimization. Notably, the dissemination of major accomplishments and future goals occurs through multiple communication channels, underscoring the organization's commitment to transparency and accountability. Projections encompass expanding educational partnerships, enhancing stakeholder relationships, and amplifying advocacy endeavors for digital inclusivity in the disabled community, aiming to leverage platforms like TED conferences and WebAble TV for heightened awareness and engagement.

The strategic objective set by TZA's SLs was centered on establishing sustainable funding sources to ensure comprehensive support for girls in lacrosse programs. A critical aspect was continuously assessing stakeholder and girls' needs, a pivotal factor in determining the essential financial support for the organization. This proactive understanding and alignment of needs with environmental demographics empowered both the workforce and stakeholders, enabling informed decision-making, fostering

innovation, and profoundly influencing the Strategic Planning Process (SPP). The strategy involved proactive risk identification through stakeholder feedback, recognizing budget limitations, and attracting donors committed to sustainable contributions.

Alignment of the budget with specific activities ensured operational stability while averting potential disruptions. Collaboratively developed action plans, primarily structured in staff meetings, addressed short-term financial, transportation, academic, and athletic needs, alongside long-term sustainability and engagement goals. Deployment strategies were periodically updated with the latest information and technology, focusing on workforce engagement, fund sustainability, and resource alignment with funding availability. The PDCA framework facilitated ongoing monitoring of effectiveness and continuous improvement. Resource allocation strategies sought to align funding with identified needs, with personal donations or fundraising efforts supplementing any shortages.

Marketing materials extensively detailed workforce requirements and highlighted the allocation of budgetary resources. Performance measures, evolving with the girls' progression, were diligently tracked, guided by the BOD input. Regular discussions, staff meetings, and thorough analyses guided both short- and long-term projections, with SLs consistently reviewing and disseminating the acquired knowledge to facilitate continuous enhancement and improvement within the organization.

In ABC's strategic implementation approach, a structured transformation of feedback from regular staff meetings into actionable steps underscores their commitment to progress. The leadership's practice of convening regular meetings, brainstorming

sessions, and the development of strategic timelines, duties, and monitoring mechanisms reflects a concerted effort towards progress. ABC's long-term vision includes expanding their presence to serve the community more comprehensively, augmenting their professional influence, and forging partnerships with similar service-oriented organizations. Employing metrics like billing statements for progress tracking, ABC maintains a dynamic overview of their evolution. Drawing from weekly meetings and collaborative engagements, the leadership benefits from foundational knowledge crucial for operational sustainability and growth. Understanding their resource limitations, ABC's long-term vision includes expansion and partnerships. Successfully securing a grant in 2020 demonstrates the fruition of their proactive growth-oriented approach, supported by their commitment to introducing innovative programs for community support. The strategic planning sessions, held monthly by the executive director and leaders, delineate both short and long-term action plans, such as enhancing human capital through grant-supported hiring and expanding capacity to improve foot traffic. This multifaceted approach aims to achieve ABC's long-term goal by securing grants and fostering continued collaborations, thereby enhancing workforce capabilities and organizational capacity.

In ASD Foundation's strategic execution, the realization of the 2016-2018 Strategic Management Plan relies heavily on the engagement and execution of tactical strategies by departmental heads and employees. These leaders take the directives outlined in the plan and further translate them into actionable steps for implementation. Regular staff meetings serve as forums for discussing progress across these tactical

strategies. Notably, while the leadership hasn't yet established concrete key performance indicators (KPIs), they are probing pertinent questions to gauge the impact of their initiatives. Queries revolve around the frequency of incidents, stress levels stemming from exposure, outreach effectiveness, and the community's evolving perception of the foundation's role. To address these inquiries, ASD Foundation's leadership is considering diverse metrics, contemplating tools like Google Ads and Google's robust analytics to gauge the effectiveness and success of their strategies.

MDM's strategy implementation focuses on several key themes aimed at transforming consumer habits and reducing waste. The organization collaborates with local partners to educate residents, particularly starting at a young age, emphasizing the importance of instilling responsible consumer behaviors early on. One notable initiative, the Reuse to Reduce Directory, stands as an online hub for businesses and nonprofits facilitating the recirculation of used goods, promoting buying, selling, or trading pre-owned items rather than purchasing new ones. These targeted efforts intend to shift consumer habits and counteract the culture of disposable consumption prevalent in the local community.

ERO's strategic planning process faced challenges due to a lack of systematic implementation in the past. The organization operated without a defined strategic plan since late 2017. The previous 2014-2017 strategic plan highlighted the need to address declining government grants and the urgency to cultivate new revenue sources. However, this plan primarily focused on the current status, end-goal projections for 2017, and broad strategies without detailed breakdowns into smaller, measurable objectives or

realignment methods if progress faltered. Consequently, there was no evidence-based progress evaluation, hindering the ability to ascertain achieved objectives or pending tasks. Moving forward, ERO's leadership aims to adopt SMART goals and utilize frameworks like the BSC and the Baldrige performance excellence model for a comprehensive assessment and measurable outcomes in their future strategic plans.

Customers

Customer Expectations

XYZ Within XYZ, senior leaders place a high priority on engaging with customers to gauge their satisfaction levels and identify areas of dissatisfaction. This proactive approach aims to foster enduring relationships, with the ultimate objective being the conversion of new customers into regular patrons. XYZ's spectrum of stakeholders encompasses not only customers but also extends to business partners, the workforce, and fellow leaders. By actively seeking feedback and insights from these stakeholders, XYZ demonstrates a commitment to understanding their needs and concerns, thereby striving for continual enhancement and long-term rapport with all involved parties.

The SLs at TZA actively pursued the fulfillment of short- and long-term customer needs through various avenues. Their approach encompassed direct engagement with customers in person and by reviewing feedback on TZA's website and social media platforms, as well as a thorough examination of email communications. SLs adopted a diverse strategy to obtain actionable insights, emphasizing direct communication and knowledge sharing with customers. This approach allowed them to stay informed about

emerging information relevant to both the workforce and customers, leveraging the Key

Success Summary (KSS) for effective communication and initiating positive change.

Furthermore, SLs diligently observed customer activities, attending events, and promptly

addressing complaints, recognizing the importance of maintaining visibility and presence

for customer satisfaction. In identifying and attracting potential customers, SLs engaged

extensively with current customers, stakeholders, and partners, aiming to grasp the needs

of the community. Valuable insights gained from these engagements, including

information from current customer families and partner organizations, aided in

understanding the desires of potential customers and eventually converting them into

satisfied customers. This process played a pivotal role in refining the overall customer

experience and shaping future strategies at TZA.

      At ABC, senior leaders engage in a dynamic and varied approach to consistently

interact with their clientele. Through a range of mechanisms including service provisions,

client feedback loops, end-of-program interviews, and regular meetings, they ensure a

continuous exchange with their customers. By employing surveys, assessments, and

various communication channels like in-person and web-based technologies, ABC

leaders gather insights from both single and dual-parent families, tailoring their programs

to fit the specific needs of each family unit. Moreover, their approach is flexible, adapting

to the unique lifestyle and communication styles of individual clients, enhancing the

efficacy of their interaction. This attentiveness and adaptability in engagement methods

reflect the commitment of ABC's leadership to foster effective and efficient

communication channels with their clientele, ultimately optimizing their services to better serve their customers' needs.

The ASD Foundation leaders place immense value on understanding and addressing the needs of its customers, primarily comprising first responders, law enforcement, and individuals encountering emergency incidents. Embracing an inclusive approach, the organization employs various channels to gather feedback, including course evaluations, social media, website interactions, and scholarly inputs. Such feedback is pivotal in evaluating the efficacy of their crisis intervention and disaster behavioral health services. Notably, they measure success not just by metrics like website visits or social media engagement but by the tangible impact their training has on first responders' ability to cope with critical incident stress, a critical determinant in saving lives. Additionally, ASD Foundation's customer engagement is comprehensive, encompassing regional training, forums, and special events to interact with their clientele. The organization strives for continual engagement, evident in initiatives like the biennial worldwide forum and the introduction of CISM Wisdom, a biweekly newsletter disseminating crucial knowledge on crisis intervention and mental health support. Through these diverse strategies, ASD Foundation remains committed to meeting the evolving needs of its customers while advancing its mission.

Leaders at MDM, the nonprofit entity, adopt a comprehensive approach in reaching out to its local customer base. Their initiatives encompass educating both school-age children on environmental awareness and offering adults avenues to recycle goods within the area. The scope of their operations suggests a broad customer

demographic, as the concept of zero waste transcends age barriers, enabling MDM to cater to a wide audience. Furthermore, the support and engagement of these customers play a pivotal role in funding a portion of the nonprofit's operational activities, underscoring the importance of customer involvement in sustaining its initiatives.

The senior leader at ERO acknowledges the challenge of effectively capturing their clients' feedback. Most clients at ERO follow personalized service plans tailored to their individual needs, aiming to facilitate as independent a lifestyle as possible. According to the senior leader, staff members engage with clients frequently throughout the week, documenting each interaction's activities and outcomes. Data collected from these interactions are aggregated, ensuring compliance with funders' requirements, and inform discussions with funders regarding resource needs. However, the leader couldn't provide evidence of a consistent review process for this data across different periods to assure ongoing compliance. While the organization appears to meet metrics, maintaining good standing with government grants, the absence of a systematic approach to track and assess this data might pose challenges in evaluating sustained compliance over time.

Customer Engagement

XYZ's customer engagement strategy epitomizes its dedication to comprehending and meeting the diverse needs of its extensive customer base. Catering to both public and private sectors, XYZ employs customized approaches aligned with sector-specific regulatory standards. While navigating the Request for Service Vendor process in the public sector limits interactions, the private sector offers more flexibility, enabling XYZ's senior leaders to establish personal connections marked by trust and openness. These

interactions transcend mere service provision; XYZ communicates openly if unable to meet requests, offering guidance or referrals, underscoring ethical customer interactions. Focused on enhancing digital accessibility for the disabled community, the organization's product offerings include free access help desks, enhancing customer engagement and workforce opportunities.

XYZ's customer segmentation spans nonprofits, government agencies, disabled communities, and business professionals across various states and countries. Central to this approach is an acute understanding of stakeholders' interests, aligned with XYZ's mission, and an unwavering commitment to delivering top-notch service. SLs leverage existing relationships and shared values, emphasizing relationship management to foster and maintain customer connections over time. Prioritizing quality service and surpassing customer expectations reinforces retention, while adapting to preferred communication methods ensures effective engagement. Overall, XYZ's approach underscores its unwavering dedication to customer-centric practices.

The SLs at TZA have fostered a customer-oriented approach, particularly concentrating on initiatives aiding young girls' personal development. Their strategic approach involves a detailed assessment of both social and financial customer needs to tailor offerings effectively. Engaging customers actively through various channels, including social media and direct interactions, SLs actively seek input to refine services and attract potential donors. Customer support mechanisms like marketing materials and website resources provide vital information, facilitating two-way communication channels to evaluate program impact. By aligning with organizational objectives, SLs

segment customers, emphasizing opportunities in sports, academics, scholarships, and community engagement within educational settings. SLs prioritize relationship management, focusing on authentic interactions and timely resolution of customer complaints through active listening and continuous improvement processes, aiming to enhance organizational performance and nurture enduring customer relationships.

ABC leaders prioritize customer service by aiming to foster brand loyalty and meet client expectations, drawing from Dragnic's insights (2014). They actively engage with clients to not only enhance profitability but also address concerns, as emphasized by Ajiboye et al. (2019). ABC staff build strong relationships through quality service, mentoring, and aligning families with suitable programs. Engagements happen through surveys, life skills classes, and various channels like word-of-mouth, social media, walk-ins, partnerships, and research, effectively reaching new clients. The executive team engages organizations, funders, and prospective clients through diverse communication methods. They handle critical support needs during intake sessions and document them thoroughly. ABC has a robust complaint resolution system, ensuring adherence to policies and prompt resolution through meetings, reinstating customer confidence. Assessing satisfaction, dissatisfaction, and engagement during sessions and surveys enables ABC to use feedback for service improvement and social impact.

The nonprofit, MDM, emphasizes customer engagement by actively interacting with the local community to discern their needs, aligning with principles outlined in the Baldrige performance excellence program (2020). Leveraging various communication channels such as social media platforms and electronic forums, MDM strategically

connects with its customers. Notably, the organization focuses on educating the community about zero waste and the significance of curbing throw-away consumerism. Through public events open to all, MDM garners valuable insights and feedback from these engagements, fostering a robust relationship with its customer base. The commitment to educational initiatives and open events underscores MDM's dedication to engaging the public, thereby amplifying their impact within the local community.

In ERO's operational scope, funding primarily stems from federal and state sources to address specific mandates aimed at enhancing services for individuals with disabilities. Emphasizing alignment with these mandates is crucial for program expansion, securing funding, and retaining support. Staff members are encouraged to propose innovative ideas that complement these mandates, with senior leadership actively seeking funding avenues to execute proposed programs. Efforts persist in seeking new grants and exploring social enterprise expansions to secure unrestricted revenue streams for program coverage. The organization leverages its main training room as a comprehensive resource center, facilitating easy access to a broad array of programming and resources for both staff and clients. However, ERO lacks a clearly defined systematic approach for client relationship management and a comprehensive process for addressing client grievances. The strategic plan from 2014 to 2017 highlights aspirations for increased outreach, broader service coverage, and enhanced partnerships with external stakeholders, echoing the community's expressed needs. ERO acknowledges the client-centric approach, aligning services with individual goals. While the organization has complaint handling procedures through various channels like satisfaction surveys, social

media, and formal complaints to the state association, it lacks a structured database for aggregating data over time to ensure efficient operation and mission fulfillment.

Results Triad: Workforce, Operations, and Results

The integrated framework of Results Triad, encompassing Workforce, operations, and results, epitomizes a paradigm central to sustainable organizational success. This triad accentuates the intrinsic correlation between a skilled and motivated workforce, streamlined operation efficacy, and the ultimate outcomes achieved. By harmonizing the elements, organizations can foster an environment that not only maximizes operational efficiency but also cultivates a culture of continuous improvement and achievement across the broader spectrum of organizational goals.

Workforce

Workforce Environment

In overseeing the workforce environment at XYZ, the SLs focus on evaluating and fine-tuning our organization's capacity and capabilities to effectively meet our objectives. This includes assessing individual employee performance and the collective workforce capacity to manage varied responsibilities. Through consistent observation, SLs identify areas that may require additional hiring or adjustments due to workload fluctuations.

The retention strategy encompasses flexible work arrangements, competitive salaries, professional development initiatives, and rigorous recruitment processes ensuring candidate suitability. The organization leaders emphasize mentorship, coaching,

and ongoing professional development, communicated transparently through regular meetings and engagement activities, adapting to the changing needs of our workforce.

While mindful of resource limitations that can lead to workplace stress, the leaders strive to maintain a positive organizational climate through frequent engagement activities. Ensuring workplace security, health, and accessibility is a priority, advocating for employee safety and planning for comprehensive healthcare coverage in the future. Overall, the priority at XYZ remains fostering a supportive, inclusive work environment, valuing workforce morale, productivity, and performance as crucial indicators of organizational climate.

At ABC, the leadership upholds a work environment rooted in faith-based principles, emphasizing the importance of human capital within the organization. The leadership implements effective communication standards, structures for meetings across levels, and ongoing professional development opportunities, overseen by the executive directors and the human resources department. Continuous assessment of workforce capability and location needs occurs through periodic reporting, evaluations, and benchmarking against similar nonprofit organizations, guiding the organization's future trajectory. Evaluations of staff competencies align talents and expected skills, ensuring workforce readiness. Recruitment involves postings in local newspapers and social media, requiring candidates to submit applications detailing education, work experience, and skill sets. ABC's leadership models professional and ethical conduct, setting expectations for the workforce's community representation. Feedback sessions during weekly and monthly meetings reinforce these organizational expectations and align with

the organization's strategic goals and core competencies, facilitating short and long-term growth strategies.

ASD Foundation, with a team comprising 14 dedicated individuals, empowers its managers and coordinators to steer the strategic goals outlined in the 2016-2018 Strategic Management Plan. They regularly conduct status checks through face-to-face and telephonic meetings to monitor the progress of tasks. The leadership encourages an environment of initiative, prompting employees to contribute innovative ideas such as expanding course materials and leveraging website analytics to boost course attendance. Assessing workforce capability and capacity, they prioritize internal promotions where feasible and offer distinct employment categories with defined benefits. Stringent workplace policies ensure a safe and healthy environment, upholding drug-free, alcohol-free, and non-smoking regulations while adamantly rejecting any form of harassment or discrimination. Employee welfare remains paramount through comprehensive benefits including retirement plans, healthcare coverage, and robust leave policies. Moreover, plans to revamp the office environment exemplify their commitment to fostering a workspace that aligns with the foundation's mission.

MDM recognizes the importance of ensuring workplace health, security, and accessibility for its workforce, as emphasized by the Baldrige performance excellence program in 2020. Transitioning to a primarily online operation in 2020, MDM closed its physical office, pivoting towards remote work. Prior to the pandemic, both the workforce and the BOD had access to the physical workspace and necessary supplies to facilitate the nonprofit's programs. The size of a nonprofit organization significantly influences its

ability to sustain its mission, as highlighted by the Nonprofit Center in 2022. Notably, the majority of MDM's workforce comprises interns who volunteer from a state university. The organization leverages its connections and regular engagements within these educational institutions to recruit students. Furthermore, the founder's affiliation with the institution facilitates the recruitment of interns when suitable opportunities arise.

ERO's work environment centers around government-funded programming, shaping their services and objectives. The senior leadership holds authority over resource utilization, yet issues arise concerning workforce capacity utilization and team interactions with the leadership. Recruitment poses challenges due to mandated diversity requirements and limited budget for competitive salaries. Resourceful solutions include volunteer support or task delegation. While opportunities for staff development exist, a lack of structured plans prevails. The absence of systematic approaches to change management and performance tracking suggests room for improvement. Despite a compassionate workforce and ADA compliance, there's a need for a more comprehensive framework aligning with ERO's mission. Limited funding impacts training and retirement benefits, although efforts continue to enhance the office environment and healthcare support for the staff.

Workforce Engagement

XYZ demonstrates a dispersed yet cohesive workforce culture, emphasizing open communication and supportive leadership. Engaging diverse channels like meetings, social media, and direct contacts, leaders foster an inclusive environment promoting transparency and high performance. Through open-door policies and ongoing mentorship,

leaders guide employees' development, ensuring clarity on performance standards and project objectives. Acknowledgment and rewards for achievements are prevalent, encouraging continued dedication. While lacking an automated performance management system, leaders rely on personal interactions and a familial culture, leveraging the company's size to facilitate close-knit communication. Emphasis on learning, professional development, and financial support for training exhibits a commitment to individual growth and organizational enhancement. Evaluating training effectiveness and grooming future leaders underscore their investment in workforce development. XYZ leaders actively manage career progressions, preparing future leaders and ensuring a seamless succession plan for sustained organizational success.

In fostering a dynamic work environment, TZA's SLs prioritized transparent communication, active employee engagement, and a pursuit of high performance in alignment with the company's MVV, core competencies, and established values. Leveraging the KSS, SLs actively encouraged knowledge sharing among employees, fostering an atmosphere conducive to open discussions and robust engagement. These leaders consistently communicated expectations across the workforce using the KSS framework. Employee engagement within TZA mirrored the company's retention rate, a fact corroborated by an internal document review. Notably, information disseminated through TZA's website and social media platforms portrayed an engaged and motivated workforce, reaffirming their positive impact on both workforce productivity and customer engagement. Despite financial constraints leading to an unpaid workforce, SLs maintained commitment to the MVV, core competencies, and values, utilizing these

elements as primary drivers for sustaining engagement. Further substantiating this, a comprehensive analysis of the company's online presence reaffirmed SLs' practices of acknowledging and rewarding employee efforts through mechanisms such as flexible work schedules, all contributing to the realization of TZA's core competencies.

In cultivating a high-performing work environment, ABC places a strong emphasis on communication, collaboration, and support within its workforce, aligning with Jardón (2018) and Schneider et al. (2017). ABC's leadership ensures a communicative, collaborative atmosphere aimed at bolstering productivity and honing employees' skills. Regular meetings are used to engage the workforce, discuss performance outcomes, and empower staff with client interactions and decision-making authority in service provision. This leadership approach extends to consistently acknowledging and appreciating staff efforts during various interactions, including daily contacts and scheduled staff meetings.

To engage the workforce and foster a high-performance work environment, ASD Foundation leaders utilize several strategies within its small team of 14 full-time and part-time employees, along with board members. Regular weekly staff meetings serve as a platform for all in-office employees to attend, facilitating updates on strategic management policy tasks. The employees' contributions during these meetings typically encompass three or more discussion points, reflecting the longer-term employees' familiarity with day-to-day operations, often performed without explicit documentation. ASD Foundation's workforce is driven by a profound personal passion for delivering critical incident stress skills and nurturing the culture of Critical Incident Stress

Management (CISM). The core workforce comprises both part-time and full-time employees, complemented by an average of 75 volunteers who actively support the foundation's leadership and staff, notably during the biennial worldwide forum.

MDM emphasizes the crucial role of engaging, managing, and nurturing its workforce to harmonize with the organization's broader business objectives (Baldrige Performance Excellence Program, 2020). Prioritizing active listening and continuous development of individuals within the organization not only enhances internal operations but also propels the entity towards realizing its maximum capabilities. Additionally, MDM offers interns and volunteers a real-world experience within the nonprofit sector, contributing to their professional growth and hands-on understanding of the industry.

ERO's senior leader has established an open-door policy to encourage staff to share ideas and concerns, yet there's uncertainty about the comfort level among all staff in openly expressing thoughts. Moreover, there's a lack of structured guidance for the team in terms of approach, deployment, learning, and effectively integrating feedback into process enhancements. Efforts to foster personal connections between staff and those served are evident through weekly team meetings with the senior leader and an additional meeting conducted by the program manager with her direct reports. There's acknowledgment from the senior leader about the need for better integration of ERO's mission, vision, and values into these gatherings, including those with the board of directors on a monthly basis. Recognizing the significance of leadership development, a new layer of middle management has been instituted to enhance program delivery, delegate responsibilities, and fortify succession planning efforts. Citing Regan (2016),

there's emphasis on the importance of leadership development programs within the nonprofit sector to mitigate burnout and encourage aspiring leaders to assume leadership roles within the organization.

Operations

Work Processes

In the operational framework of XYZ, the SLs demonstrate a meticulous alignment of services and operational requirements with the organization's foundational mission, emphasizing digital equity within the disabled community. Actively seeking industry recognition and brand elevation, these leaders prioritize forging relationships conducive to advancing the organization's mission while enhancing overall awareness. Work processes are meticulously designed to develop and deliver products and services tailored to meet the specific needs of individuals who are blind, visually impaired, or print-disabled. These offerings are not only designed to meet but surpass stringent regulatory standards, ensuring optimal functionality, usability, and accessibility across digital platforms, websites, and documents.

Moreover, XYZ's SLs emphasize continuous workforce training at the highest level to guarantee seamless service delivery, aligning rigorously with international accessibility guidelines. Day-to-day operations rigorously adhere to these guidelines, integrating anticipatory training, procedural adjustments, and occasional upgrades to meet evolving regulatory standards. Effective communication regarding regulatory changes and training needs is paramount, ensuring employees remain well-informed while reducing product variability and enhancing reliability. Despite unwavering

adherence to established standards, the leadership actively solicits stakeholder feedback,

embracing modifications when necessary to elevate product quality and performance. The

organizational culture thrives on innovation, encouraging all members to explore avenues

for augmenting digital accessibility. Notably, within a workforce where 90% require

assistive devices, XYZ's leaders and employees conscientiously evaluate customer

relationship and operational management systems, striving to implement streamlined

internal operations effectively, considering accessibility and usability as primary criteria.

Innovation Management at TZA operates through a comprehensive review system

that gathers feedback from various sources including the workforce, customers,

participants, stakeholders, and digital platforms like the company website and social

media channels. This information serves as a cornerstone for service enhancements and

communication strategies. TZA's SLs employ the Process Design Improvement System

(PDIS) to evaluate the feasibility of new ideas in alignment with the organization's MVV,

and strategic initiatives, primarily focused on empowering and educating girls through

lacrosse. Financial and workforce assessments using the PDIS and budget reviews by the

BOD support decisions regarding project funding. The PDIS engages single- and double-

loop learning to fine-tune services, while the company's core competency in empowering

through lacrosse shapes program development.

The SLs leverage the Strategic Planning Process (SPP) to align customer and

stakeholder expectations and requirements, ensuring transparency and inclusion. Changes

and enhancements are communicated through Knowledge Sharing Systems (KSS) for

transparent distribution among key stakeholders and customers. Operational Process

Reviews (OPR) play a pivotal role in outlining the structure of programs and services, demonstrating a clear understanding of learning loops and continual improvement cycles.

Process Management within TZA follows a rigorous approach outlined in the SPP. The SLs annually review critical customer requirements and pair key process measures with the organization's core competency, enabling the workforce to address issues proactively. These key processes are determined collaboratively by the SLs and the BOD. Continuous monitoring of organizational progress through OPR facilitates the development of updated services, informed by customer and participant feedback. TZA's support processes—communication, human services, safety, and fiscal services—are continually monitored through the OPR and systematically integrated into the SPP to drive organizational improvements.

ABC places considerable importance on its work processes, recognizing their pivotal role in daily operations and overall success. The organization strategically incorporates service and work process requirements into its strategic planning, addressing challenges promptly and innovatively. The leadership at ABC ensures that these processes remain dynamic, reflecting industry changes and customer feedback to align with the long-term growth strategy. Their approach involves a meticulous design process informed by thorough research, feedback analysis, and adherence to regulatory guidelines.

Embracing technological advancements is central to ABC's process evolution, while a commitment to continual improvement remains a cornerstone. The leadership fosters improvement through feedback acquisition, benchmarking against industry

standards, researching best practices, and comprehensive quantitative and qualitative performance metrics. At ABC, critical support processes—such as human resources, finance, information technology, innovation, logistics, administration, and bookkeeping—are rigorously defined based on assessments, goal alignment, needs analysis, and industry benchmarks. These crucial processes undergo continuous evaluation to ensure ongoing effectiveness and alignment with the organization's objectives.

The ASD Foundation's leadership and staff intricately design, manage, and continually refine their key products, services, and work processes, demonstrating a profound commitment to supporting heroes, first responders, and military veterans. Department managers and coordinators are entrusted with the fulfillment of tasks delineated within the 2016-2018 Strategic Management Plan, a collaborative effort between leadership and staff to achieve the foundation's mission over a three-year horizon. However, there's a need for clearer development of departmental action plans aligned with both the strategic plan tasks and periodic feedback sourced from CISM-related customers.

The Foundation values customer feedback as a compass guiding community impact enhancement and the continual alignment of its operations with customer requirements and expectations. This feedback is garnered through diverse channels, including electronic and paper-based student course evaluations, instructor assessments, personal faculty experiences, testimonials, comments, and emails received by the foundation, insights from attendees at global forums, and observations at conferences and

symposiums like the International Association of Chiefs of Police, Security Professionals, and Crisis Intervention Team conferences. The foundation actively participates in these events, not merely attending but also setting up booths and presentations to engage and learn from participants.

To strengthen their operational insights, the Foundation leaders invested in Cvent registration software in 2017, facilitating efficient tracking, follow-up communication, and marketing strategies tailored to former and current conference attendees. This software not only streamlines registration but also enhances communication with customers through biweekly CISM Wisdom and ASD Foundation updates, leveraging the inclusion of customer email addresses. Additionally, the Foundation collaborates with partner organizations like the Maryland Institute for Emergency Medical Services Systems, the Global Security Exchange, and others, fostering potential education and training program development. For instance, collaboration with Social Workers Across Borders facilitated the introduction of AIP courses into China, demonstrating a concerted effort to nurture the field of CISM through strategic partnerships and continuous process refinement.

For MDM, it's imperative to remain adaptable to shifts in technology, the external environment, cultural dynamics, and strategic objectives to ensure sustained relevance and efficacy (Baldrige Performance Excellence Program, 2020). Notably, the founder actively engages in curating presentations aimed at the local community. Furthermore, MDM has innovatively introduced the Reuse to Reduce Directory, an online repository spotlighting businesses and nonprofits facilitating the repurposing of used goods in the

area. The involvement of local interns significantly bolsters MDM's local outreach endeavors and supports essential administrative functions, contributing profoundly to the multifaceted operations of the organization.

ERO ensuring sustained funding for services while managing program costs is a significant challenge for RO. Mandated to offer various essential services to individuals with disabilities, ERO faces the perpetual struggle of insufficient funding from government sources. Although these mandates receive federal and state funding, the allocations don't adequately cover the full operational costs. To address this, establishing a comprehensive dashboard detailing the funding shortfalls and surpluses per program can provide transparency and evidence-based insights to external stakeholders and funders. This approach enhances financial governance, ensuring the sustainability of their programs. Moreover, in a bid to secure additional revenue and meet constituents' needs, ERO's senior leadership introduced two distinct social enterprise models. However, challenges persist as the leadership lacks a cohesive framework for operations management, resource allocation, and branding strategies for these social enterprises. Presently, ERO suffers from a lack of brand recognition in the community, hindering potential funding and collaboration opportunities. Collaborating with peer agencies statewide could aid in bolstering awareness of their services and social enterprise models. However, funding constraints prevent the organization from executing a campaign aimed at boosting brand recognition, expanding social enterprises, and raising awareness of their services. Overall, there's a crucial need for a systematic resource management

approach that integrates short- and long-term goals, incorporating financial and non-financial metrics to drive the organization's success.

Operational Effectiveness

In striving for operational efficiency, XYZ senior leaders are keenly focused on optimizing internal management processes. Currently reliant on manual information systems due to limitations in software accessibility and usability, the organization recognizes the imperative of transitioning to automated operational systems as they expand. Anticipating significant benefits such as reduced time consumption, decreased operational costs, and enhanced overall efficiency, the leaders are meticulously evaluating software solutions that prioritize accessibility and usability. Once a suitable solution is approved, a gradual integration into the operational management framework is planned. Maintaining the reliability of information systems remains a priority, achieved through the use of secure servers and vigilant monitoring by dedicated IT support teams and a Help Desk. Ensuring cybersecurity is reinforced by stringent limitations on access to sensitive data like payroll systems and staff files. Additionally, XYZ diligently fosters a safe working environment by regularly exercising safety and emergency protocols. The organization's Active Shooter protocol includes various measures like enhanced door locks, surveillance cameras, and clear exit markings, underscoring their commitment to employee safety. Furthermore, XYZ leaders extend their efforts beyond the organization, evaluating safety protocols in local schools and offering recommendations to fortify their safety policies. Employee safety and well-being are held in high regard, evident through

consistent training provided within school systems or through athletic training employers to ensure a safe workplace environment.

In pursuit of operational efficiency and effectiveness, the SLs at TZA diligently monitored the financial revenue and expenses on a monthly basis. While the alignment between process efficiency and effectiveness appeared positive based on the organization's social media platforms and website, internal documents lacked sufficient information, prompting the need for enhanced information tracking. Concerning supply-chain management, the SLs employed organizational work systems to effectively manage and uphold TZA Company's supply chain. Collaborating with the BOD, they identified and vetted qualified suppliers and vendors, ensuring alignment with the company's mission, vision, core competencies, and values. Continuous engagement with vendors occurred through various communication channels, fostering a shared understanding and alignment. Additionally, SLs regularly reviewed and analyzed vendor relationships, leveraging methods like the KSS and scheduled meetings for continuous improvement and information exchange. Prioritizing safety and emergency preparedness, the SLs remained committed to promoting a secure and supportive environment, addressing the key needs and requirements of both customers and the workforce across all provided services.

Ensuring effective operations is vital for leaders aiming to foster a secure work environment and deliver top-tier service to customers. Acquiring firsthand insight into operations management proves essential, along with a deep understanding of business operation elements, enabling the enhancement of efficiency in daily activities (as per the

Baldrige Performance Excellence Framework, 2018). At TZA, the leadership optimizes

employee performance by intertwining robust employee training and development

initiatives with strategic investments in technology.

Operational effectiveness remains a cornerstone for ASD Foundation's leadership,

encompassing various pivotal aspects of management. The core areas entail efficiency

and effectiveness, management of information systems, and safety preparedness. Within

the realm of efficiency and effectiveness, department directors actively engage with the

2016-2018 Strategic Management Plan, utilizing it as a guiding beacon for strategic

actions and task execution. However, the formulation of individual departmental action

plans remains infrequent among department managers, often discussed during weekly

staff meetings led by the CEO and department directors. Decision-making authority for

significant tasks, such as funding allocation for events like the biennial worldwide forum,

predominantly rests with the CEO. Regarding information systems, the foundation

contracts Internet and website hosting services, ensuring reliability, security, and

cybersecurity measures. Hosting is managed by an external company that employs solid-

state drives and utilizes updated PHP versions, bolstering website speed and minimizing

security vulnerabilities. The company maintains auto-healing servers, robust firewalls,

regular patching, and SSL encryption, ensuring data remains encrypted during

transmission. Safety preparedness within ASD Foundation aligns with legal requirements

despite its non-manufacturing nature. The CEO ensures adherence to Occupational Safety

and Health Administration (OSHA) guidelines, emphasizing a hazard-free workplace

environment and enforcing safety protocols through comprehensive employee handbook policies, covering workplace practices and building procedures.

SLs play a pivotal role in overseeing the fiscal viability and operational efficacy of their entities (Baldrige Performance Excellence Program, 2020). Within MDM, the founder diligently maintains meticulous records of the organization's cash flow and expenditure patterns, ensuring a detailed understanding of its financial health. Notably, MDM functions predominantly with an all-volunteer workforce, a structure aimed at reducing operational costs. However, it's essential to highlight that nonprofits should not exclusively rely on volunteer labor as a substitute for trained professional staff (Nonprofit Center, 2022). While volunteers offer invaluable contributions, their availability might be contingent upon spare time, potentially impacting the organization's operational stability.

Operational effectiveness constitutes a cornerstone of the SL's dedication to implementing quality programming and refining processes to cater to their clients' needs. At the heart of the team's strategic approach lies the Individual Living Plan (ILP) for each client, outlining mutual commitments between clients and ERO's staff to facilitate as independent a lifestyle as possible given the individual's disability. Following a recent leadership restructure where a seasoned staff member was promoted to manager, the frequency of random quality checks has reduced to a single round to verify staff-client engagement in creating customized ILPs. The department manager aims to conduct monthly file reviews to ensure quality control and procedural adherence within each ILP. However, the current approach lacks a systematic process for consistent quality control checks through regular file audits. The senior leader paused the review process

temporarily due to a shortage of 2.5 full-time employees in late 2018, with ongoing interviews to fill vacancies. Improving the review process's functionality intends to identify training opportunities and commend exemplary team efforts. Yet, a dashboard for tracking data points over time is absent, limiting analysis to the agency level, overlooking individual trends.

Presently, there's no structured approach to aligning day-to-day workforce activities with overarching organizational goals. The existing open-door communication policy enables team members to express ideas or concerns directly to the senior leader or, if necessary, the board chair. While peer agencies convene occasionally to exchange ideas, there's no established process for systematically sharing, implementing, or monitoring strategies across these agencies. ERO remains proactive in volunteering for audits by state and federal agencies to enhance processes, earning recognition for excellence in their processes. However, the process of implementation and monitoring is largely visual, lacking a formal data capture and review mechanism. Partnerships in supply-chain management remain unstructured, with no defined process for managing relationships or engaging providers in continual improvements. ERO's leaders lack a systematic review process for assessing the quality of contractor work or gathering client feedback for process enhancement. While the SL expresses confidence in the current IT provider, there's room for exploring alternative providers for potential enhancements or cost savings. Despite this, the team continues to seek innovative approaches, exemplified by their social enterprises offering braille services and generating unrestricted revenue. However, a formal business continuity plan, updated emergency kits, and a standardized

safety preparedness audit process are lacking, requiring attention for improved emergency readiness and response.

Measurement, Analysis, and Knowledge Management

Measurement, Analysis, and Improvement of Organizational Performance

Within XYZ, senior leadership and staff primarily rely on informal systems for gauging organizational performance, encompassing criteria such as the completion of overall and strategic goals, customer retention rates, and year-on-year revenue growth differentials. Notably, a significant accomplishment in 2018, XYZ's selection as an affiliate member of the New York State Preferred Source Program for the Blind, underscored an endorsement of the organization's service provision capabilities by New York State authorities, symbolizing a tangible reflection of performance. However, XYZ currently lacks a standardized approach for measuring and analyzing organizational performance, prompting senior leaders to acknowledge the potential benefits of formalizing such methods to enhance strategic planning processes.

Weekly executive meetings serve as a pivotal platform for reviewing objectives, revising project priorities, and discussing improvement areas and opportunities for growth. SLs actively scrutinize the customer base, financial statements, and cash flow regularly to evaluate financial sustainability, employing fluctuations in revenue and retained customers as indicators of organizational performance. Recognizing the need for improvement, leaders consider inputs from the workforce, customers, and disabled end-users, aiming to refine the organizational structure, revamp personnel management processes, and introduce a project management element for streamlined project

coordination. These leaders are currently engaged in reevaluating workforce models,

leveraging historical data, external research, and industry assumptions to forecast staffing

requirements and are exploring the integration of analytical software to enhance

workload planning accuracy, indicative of a concerted effort towards operational

enhancement and adaptability.

TZA's performance measurement tactics revolve around data-driven insights

gathered from diverse sources, including customer interactions, partner feedback, and

stakeholder inputs. TZA's SLs utilize data from both internal staff meetings and external

communications to assess organizational performance from multiple viewpoints. They

particularly emphasize measuring the Strategic Performance Plan (SPP) and initiatives,

employing the Key Success Systems (KSS) for communication and goal alignment.

Benchmarks and market data inform TZA's efforts to establish higher standards and

evaluate achievements, such as monitoring participation rates in local schools, which

align with the organization's core values and mission. Real-time data collection from

social media and website interactions enables prompt responses to feedback and drives

continuous service enhancement. Workforce meetings play a crucial role in reviewing and

analyzing organizational performance, fostering adaptability to external changes.

Additionally, the BOD actively engages in reviewing budgets and progress indicators,

aligning with TZA's commitment to lacrosse skill enhancement, academic opportunities,

and community advocacy. SLs' engagement with the Learning Management Model

(LMM) and Systems (LMS) underscores their dedication to meeting community needs.

Success stories shared on social media platforms validate the effectiveness of SLs' efforts

in fulfilling both the social and financial aspirations of the community. Improvement

strategies, conveyed through KSS, drive innovation and organizational alignment, while

the OPR aids in adjusting action plans, ensuring stakeholder satisfaction, and responding

to changes in the internal and external environment. Overall, the integration of data-

driven insights, consistent communication channels, and iterative improvements

underscores TZA's commitment to enhancing organizational performance and fostering

innovation.

This business location, ABC, effectively manages measurement, analysis, and

knowledge through its systematic database collection and storage of daily data. Financial

reports and discussions in monthly meetings contribute to preserving vital information.

ABC's leadership has implemented a performance tracking system, reviewing work

progress quarterly, holding bi-weekly meetings with supervisors, and conducting

continuous progress report reviews in leadership meetings. Performance measures are

regularly monitored based on defined organizational values, spanning bi-weekly,

monthly, quarterly, and annual assessments. The focus remains on continuous

development and personnel enhancement opportunities. Results guide decision-making at

all management levels, shaping strategic goals and driving process improvements.

Leadership employs comparative data analysis for performance evaluation and

benchmarking. Email, surveys, and customer feedback are actively used to cultivate a

customer-centric culture and inform strategic decisions on processes and performance.

Regular weekly and monthly staff training aligns with ABC's mission and ensures high-

quality customer support. Successful leaders leverage past performance to gauge and

analyze projected outcomes. ABC operates independently, without requiring higher authorization, aligning performance with both short and long-term goals. Performance improvement plans are communicated to staff through face-to-face interactions, email, and weekly meetings. Resource allocation prioritizes long-term strategic goals based on past performance and industry standards. ABC gauges future community support and growth strategies by closely analyzing walk-in client numbers, support-related phone calls, and financial records.

The ASD Foundation, despite being a nonprofit organization with a distinct mission, faces the challenge of lacking comparable organizations for performance benchmarking. To gauge their effectiveness, the foundation relies on various customer engagements across platforms like Regional Training, biennial worldwide forums, and online feedback from diverse programs. Their assessment of success, initially based on course offerings, student attendance, forum participation, memberships, and donor numbers, evolved with the adoption of modern IT applications like Google Analytics, Google AdWords, QuickBooks, Subscription DNA, Cvent, and Kindful software. These tools provided critical insights into task completion and success metrics. Weekly CEO staff meetings and Director of Training and Education discussions serve as arenas to evaluate progress towards mission execution and streamline workflow assessments. The utilization of dashboard graphics, such as the snapshot of website traffic acquisition methods, like organic searches, direct visits, referrals, paid searches, emails, and social media, provides valuable visual data to leadership, allowing detailed department-specific reports for staff to gauge their departmental performance.

MDM's approach to ensuring responsible fund utilization underscores its commitment to transparency and accountability. The organization meticulously keeps comprehensive records of expenses, aligning with its dedication to transparent financial operations. Moreover, MDM readily provides detailed accounting information upon request, showcasing its commitment to responsible stewardship of contributed funds. This dedication reflects MDM's ethos, aiming to utilize entrusted resources judiciously to advance societal well-being objectives. These objectives are oriented toward reducing carbon footprints, effective waste management, efficient resource utilization, and fostering positive impacts on both the community and the environment. Such meticulous financial record-keeping and transparency align with the organization's broader commitment to leveraging funds effectively toward meaningful societal and environmental contributions.

Within ERO, enhancing the process of measuring, analyzing, and improving organizational performance stands as a pivotal area requiring significant improvement. Leveraging theories such as the BSC and the Baldrige performance excellence framework presents a promising avenue for the leadership team to establish a comprehensive management system. Presently, the organization leaders rely on an electronic system for client information input, but struggles with consistent data review, leading to challenges in systematically analyzing alignment with ERO's MVV. Issues in timely data entry arise due to various factors, from staff complacency to on-site client interactions, hindering accurate record updates. This lack of a structured platform for performance measurement affects the monitoring of data updates and obscures the

organization's collective understanding of individual activities' impact and alignment with defined objectives.

The absence of performance metrics in board engagement hampers their active role in guiding strategic objectives. Moreover, ERO faces challenges due to the absence of a systematic approach for projecting organizational performance, exacerbated by shifts in government funding eligibility criteria. The organization lacks defined action plans for program expansions and social enterprise efforts, further impacting their ability to project and prepare for shifts in performance criteria. Qualitative performance analysis and limited historical data hinder accurate trend evaluations, necessitating a shift towards more quantitative assessment methodologies. To drive continuous innovation and improvement, initiatives such as the Consumer Advisory Board need sustained focus, allowing ERO to evolve its business model effectively.

Information and Knowledge Management

Within the nonprofit sector, XYZ has established itself as a pioneer in digital accessibility and usability for disabled end-users, elevating the significance of information and knowledge management for its senior leaders. The organization rigorously validates the quality of its data across various platforms, including websites and social media, with dedicated personnel overseeing these aspects. To safeguard internal information, leaders and staff utilize Dropbox, prioritizing accessibility, security, and collaborative functionalities. Emphasizing workforce investment, XYZ leaders advocate professional development, exemplified by certifications in accessibility core competencies. Efforts extend to formalizing organizational knowledge through an

evolving employee handbook and structured onboarding processes. Comparative data access remains limited due to the unique nature of XYZ's nonprofit offerings. However, insights gleaned from dissatisfied customers of similar for-profit entities inform employee training strategies, ensuring service quality and customer satisfaction. Given XYZ's clientele dealing with ADA-related compliance, information shapes service scope, aiding in both customer guidance and raising awareness about disability and digital equity. This multifaceted approach underscores XYZ's commitment to leveraging information and knowledge to enhance performance across its operations within the nonprofit landscape.

TZA's approach to managing organizational knowledge revolves around the utilization of the KSS to disseminate and assess information across stakeholders. The integration of the OPR process with the KSS enables TZA's senior leaders to regularly communicate with the workforce and stakeholders, aligning on mission, values, and strategic initiatives. Discussions generate fresh insights, shared through diverse channels like emails, meetings, calls, and online platforms. The KSS embodies knowledge transfer methods, results, and feedback, aiding the formulation of Strategic Planning Processes (SPP) and fostering innovation and goal achievement. The OPR empowers leaders to execute action plans, decipher progress, and facilitate organizational learning. Information technology, fundamental to operations, undergoes rigorous scrutiny to ensure quality, reliability, and security. Leveraging Elevation, an agency specializing in website security and analytics, TZA ensures robust systems, aiding decision-making and goal

attainment. This approach ensures the security and efficiency of the TZA Company website while utilizing Facebook, a password-protected platform, for product promotion.

Organization ABC's approach to information and knowledge management lacks a defined method or structured framework. Within its operational structure, there's an observable absence of systematic processes or established strategies aimed at organizing, disseminating, or leveraging information effectively. This absence signifies a shortfall in how the organization collects, processes, shares, and utilizes its knowledge resources. The absence of such methods potentially hampers the organization's ability to capitalize on its collective knowledge, impeding informed decision-making processes and inhibiting the seamless dissemination of crucial information across the organization's various departments or stakeholders.

ASD Foundation's information and knowledge management strategies epitomize a deliberate approach to harnessing organizational resources. Embracing the facets outlined by Granados et al. (2017) and Inkinen (2016), ASD meticulously steers its management of knowledge resources. The organization's pursuit of enhancing information dissemination, evident in the 2016-2018 Strategic Management Plan, propelled a transition to cloud technology, leveraging platforms like Google Drive for operational flexibility and accessibility. Security and confidentiality underscore financial and sensitive data management on local systems. Additionally, upgrades to relational database applications and the adoption of Kindful, an online donor management program, revolutionized donor engagement, allowing for diverse donation opportunities and automated corporate sponsorships. ASD Foundation's commitment to organizational

knowledge aligns with ISO 9001:2015, emphasizing shared experiential learning to drive the organization's objectives. Leveraging the cumulative expertise of longstanding employees and board members, ASD taps into intellectual resources encompassing critical incident stress management, education, and clinical counseling, extending beyond core leadership. Integrating nonprofit best practices, accounting principles, and IRS guidelines into their governance fosters a robust framework for effective operations. ASD's organizational learning ethos is evident in its strategic planning, as evidenced by initiatives that necessitated researching social media, webpage technology, and Google Analytics for improved educational programs and efficient strategies. This inclusive approach underscores the organization's commitment to continually learning and evolving to meet its mission and vision effectively.

Certainly, protecting intellectual property is paramount, especially for nonprofits like MDM that create innovative presentations, programs, and online resources. Given the risk of potential misuse or unauthorized use by other entities, safeguarding these unique offerings becomes crucial. For instance, MDM's "Reuse to Reduce Directory," an online repository facilitating the redistribution of used goods among businesses and nonprofits, represents a valuable asset. MDM recognizes the directory's potential and is contemplating monetizing it. This initiative aims to cover maintenance costs while offering local stakeholders a beneficial product that contributes to waste reduction in the community. By exploring monetization avenues, MDM not only safeguards its intellectual property but also sustains its mission-driven initiatives through innovative strategies.

ERO's leadership is actively engaged in enhancing their information and knowledge management processes. However, challenges persist in various areas, including data security, transparency in financial reporting, limited knowledge sharing within and outside the organization, and difficulty integrating data systems. The organization employs a paper intake system stored securely, but without a defined protocol for its duration or destruction. Efforts to strengthen leadership resulted in promoting individuals to manage data integrity, but gaps emerged due to the departure of a program manager, impacting systematic delegation. While financial reports are reviewed monthly by senior leaders and the board, transparency, and integration of financial performance with organizational goals remain limited. The onboarding process is comprehensive yet constrained by funding for continuing education. There's a lack of systematic knowledge collaboration both internally and externally, mainly reliant on word-of-mouth sharing, leading to reactive client-centric efforts. The leadership acknowledges the need for improvement in sharing best practices and learning from external agencies. Despite challenges, the SL fosters a learning culture, welcoming new ideas and promoting an open-door policy. However, staffing gaps and limited resources pose constraints, urging the leadership team to strive for excellence amidst these challenges. Opportunities lie in adopting frameworks like Baldrige and BSC to guide strategy, improve workforce development, and enhance knowledge sharing both internally and externally. Addressing these challenges could significantly strengthen ERO's information and knowledge management capabilities while navigating resource constraints.

Collection, Analysis, and Preparation of Results

Thematic Findings

In this meta-analysis study, I sought to comprehensively examine the strategies employed by leaders within nonprofit organizations to navigate financial change and ensure sustainable organizational practices. Drawing from a population of previously approved Walden University doctoral studies that specifically investigated effective strategies crucial for maintaining the long-term organizational and financial well-being within the United States, this study utilized thematic analysis. This analytical approach was applied to discern key themes, process strengths, process opportunities, results strengths, and results opportunities, by synthesizing insights from both existing literature and the conceptual framework of GST. In the study, I identified common key thematic findings, robust communication and stakeholder engagement, mission alignment and dedication, and continuous improvement and learning culture.

Robust Communication and Stakeholder Engagement

In the meta-analysis study, I identified robust communication strategies and proactive stakeholder engagement constitute foundational elements for success within nonprofit organizations. Delving into the thematic section dedicated to these aspects, the findings closely align with established literature and the conceptual framework that guided this study. The identification of effective communication channels and sustained dialogues emerges as pivotal contributors to success, as evidenced in entities such as XYZ, ASD Foundation, and TZA Company. These observations resonate with Odor (2018), who underscored the multifaceted nature of sustainability, encompassing

adaptation, operational efficiency, leadership, engagement, and personnel support. The highlighted emphasis on robust communication practices and active stakeholder engagement aligns seamlessly with existing literature, emphasizing the indispensable role of fostering enduring relationships for organizational success. It is evident that business designs promoting sustainability are instrumental for long-term success, as underscored by Johnson et al. (2017).

Furthermore, this theme aligns well with the conceptual framework derived from GST, notably emphasizing the understanding of interrelationships and contributions of individual components to an entire system (Von Bertalanffy, 1950, 1953). For instance, within this theme, XYZ's approach to customer-centricity initiates from the outset of engagement, where leaders meticulously elucidate services, processes, and testing metrics to address any customer concerns. Additionally, they implement a structured post-service feedback system to communicate adjustments made, ensuring an improved experience for disabled end-users. These examples within the theme highlight how the identified communication mechanisms align both with established literature and the conceptual framework, showcasing their pivotal role in nurturing successful organizational practices and relationships.

Mission Alignment and Dedication

The second theme is the consistent dedication to aligning operational strategies with the core mission of nonprofit organizations. It became evident that this theme aligned with both the existing literature and the conceptual framework guiding this study. The emerging commitment seen in entities like TZA Company, ABC, and MDM toward

mission-driven approaches resonates strongly with the literature review's assertions. Bigelow and Pratt (2022) underlined strategic planning as a comprehensive process encompassing vision statement, mission statement, analysis, strategic formulation, and strategy implementation and management. The identified alignment emphasizes the pivotal role of orienting operational frameworks around the core mission, ensuring coherence and purpose in organizational endeavors, corroborating the literature's stance.

Moreover, this theme aligns well with the conceptual framework rooted in GST, offering a comprehensive approach for leaders to comprehend and manage complex systems within nonprofits, thus promoting organizational health and effectiveness (Kast & Rosenzweig, 1972). For instance, within this theme, TZA Company's workforce climate illustrated a positive environment fostering close-knit relationships among the team, volunteers, and even parents of the participants. This closeness facilitated the swift reception and implementation of feedback, aligning the workforce with TZA Company's mission, vision, and values. This example underscores the importance of engaged and communicative leadership in fostering an organizational environment where the nonprofit thrives while staying aligned with its core mission and values.

Continuous Improvement and Learning Culture

The third theme, which underscores the shared dedication among nonprofits to foster continuous improvement and cultivate a culture of learning, aligns with several facets observed in both the existing literature and the conceptual framework guiding this study. Entities like ERO showcased efforts aimed at evolving from reactive approaches, demonstrating a commitment to ongoing refinement and growth. These findings

underscored the significance of adaptability and continual enhancement as crucial elements for achieving organizational excellence and long-term sustainability within the nonprofit sector. This theme resonates with the literature review emphasized innovation and strategic planning as key drivers of success, particularly in challenging environments (Malkus, 2011; Strang, 2018). Additionally, the alignment with the conceptual framework of GST is apparent as its lens on interconnectivity parallels the nonprofit sector's need for sustainable and well-coordinated systems (Von Bertalanffy, 1972).

For instance, within this theme, the evaluation of ERO's operations brought to light a significant finding regarding the organization's potential to refine its processes to foster a learning culture aligned with its mission, vision, and values. Drawing upon the framework provided by the Baldrige performance excellence model (Baldrige, 2017), it delineates the phases of organizational process growth, notably illustrating that ERO's leadership processes often oscillate between reactive problem-solving and an early systematic approach. This identification of process opportunities spans across critical categories—Leadership, Strategy, Customers, Measurement, Analysis, and Knowledge Management, Workforce, Operations, and Results—revealing six distinct areas warranting improvement.

Product and Process Results

XYZ leaders showcase a diverse array of products and services aligned with their mission of fostering digital equity and inclusivity. Among their standout offerings is the XYZ JAW Script, specifically designed for QuickBooks, enabling visually impaired or print-disabled individuals to manage finances and pursue employment in the financial

sector. This product, in collaboration with Intuit since 2011, undergoes annual updates and is priced between $275.00 to $1,025.00. Services provided by XYZ encompass Accessibility Program Management, Evaluations and Testing, Usability Testing, and Quickbooks Scripts and Training, with costs varying based on the scope of work, ranging from 50 to 400 hours, priced between $125 to $200 per hour per customer organization.

XYZ's leaders assess service and process outcomes by tracking metrics like retained customers, annual revenues, and organizational growth percentages. Result evaluation for products and customer service processes centers on responsiveness to inquiries, new customer conversion into repeat or long-term customers, and tailored engagement activities aiming for customer retention. Regular quarterly quality assurance testing ensures long-term customers' compliance with regulations and the accessibility and usability of their web applications post ICT system and security updates. Customer testimonials serve as a testimonial to the effectiveness of their products and customer service, although a formal performance measurement system for process effectiveness is yet to be implemented.

Preparedness for emergencies is a priority at XYZ, even though they haven't faced real-world emergencies. With a formal emergency preparedness plan in place, employees undergo regular drills covering scenarios like fire emergencies and active shooter situations. Utilizing evacuation plans and facility lockdown procedures, XYZ maintains a proactive stance in ensuring employee safety within their premises.

TZA Company, a single nonprofit based in Baltimore, Maryland, primarily focused on fostering a student-centered lacrosse coaching environment, emphasizing a

learning-centered standard of excellence. Over seven years, six as a nonprofit entity, the organization positively impacted the lives of approximately 50 middle and high school girls. The organization had a consistent 97% completion rate among participants over the years. Services provided included building confidence, enhancing athletic skills, and exposing girls to academic and personal growth opportunities. The array of offerings ranged from lacrosse clinics, camps, college visits to year-round tutoring, and relationship-building initiatives. To maintain customer satisfaction, the organization implemented a Complaint Management Process (CMP) allowing direct engagement with customers, stakeholders, and collaborators to address concerns effectively. Starting in 2010, the company committed to supporting social and financial needs, empowering girls through mentorship, tutoring, and lacrosse coaching. Additionally, they raised funds for player equipment, uniforms, and transportation. Integrating the Program Development and Implementation System (PDIS) into their KSS streamlined operations, adjusting to girls' maturation and skill progressions. With ten clinics annually, TZA Company facilitated connections with local lacrosse players and coaches, nurturing long-term mentorship opportunities and revenue generation. For emergency preparedness, maintaining relationships with donors ensured equipment availability, while providing CPR and first aid training enhanced workforce readiness. Developing comprehensive safety and emergency preparedness training could further fortify their response strategies. The organization's adept supply-chain management involved collaboration with local vendors and successful fundraising initiatives, reflected positively across social media and vendor interactions. Overall, TZA Company's efforts in lacrosse coaching and

academic support have significantly impacted the lives of young girls, demonstrating a commitment to their development, safety, and athletic growth.

The nonprofit organization ABC has been an integral part of southern California for over two decades, primarily dedicated to addressing community needs and supporting families requiring assistance. With a strong commitment to expanding its services, ABC aims to enhance its capacity, striving to serve a broader spectrum of families within the community. Advocacy remains a core principle for ABC, coupled with an unwavering focus on delivering exceptional customer service. The leadership actively engages with the community, specifically targeting single parents, equipping them with the necessary skills for self-sufficiency, while also prioritizing proper nutrition and healthy lifestyles for their children. At this location, ABC has established efficient work processes driven by a disciplined staff. Their operations are marked by adherence to best practices, a deep understanding of client needs, and strict adherence to safety protocols when interacting with clients, ensuring effective and secure service delivery.

The ASD Foundation, a registered nonprofit organization, specializes in preincident education tailored to address the mental health concerns of responders dealing with crises and disasters. Their array of products and services encompass education and training programs along with outreach and consultation initiatives, designed specifically to aid first responders. This includes classroom and e-learning courses focused on critical incident stress, support for Critical Incident Stress Management (CISM) teams, scholarships facilitating access to critical incident stress training, and hosting global forums addressing various crisis-related aspects. Despite a

modest structure of 14 employees and nine board members, the foundation leverages certified instructors to deliver CISM training across 54 courses, significantly expanding offerings like Regional Training, Speakers Bureau, Advance Instructor Candidate Program, and Online Training over the last five years. While the Strategic Management Plan outlines overarching tasks, departmental actions often lack synchronization, impacting the maximization of their collective effectiveness. Interdepartmental coordination occasionally takes place, especially when directors request specific data from platforms like Google Analytics, Cvent, and Kindful for service/product development or marketing initiatives. In 2017, securing an Emergency Response and Safety Grant of $5,000 from BGE enabled the provision of essential courses to 105 students, enhancing crisis response skills. Currently exploring additional grant opportunities, the foundation aims to utilize forthcoming funds for further course offerings or student scholarships, indicating a commitment to expanding their crucial services and educational support for first responders.

The MDM nonprofit lacked a structured system to gauge both product and process results. Predominantly operated by intern-volunteers under the leadership of a founder balancing a separate paying job, the organization did not prioritize key measures or indicators during this period. This absence highlights an opportunity for MDM to introduce specific, measurable goals within the organization. Integrating these measures could significantly benefit the nonprofit by offering clear benchmarks for employee performance and organizational effectiveness. Instituting such indicators would facilitate

progress monitoring, enabling a more comprehensive evaluation of the nonprofit's product offerings and operational processes, thus fostering continuous improvement.

The leadership at ERO lacks a systematic approach in measuring product and process outcomes. They concentrate on goals aligned with their organizational mandates but struggle to quantify progress. For instance, in their transitional services, tracking individual progress transitioning from nursing homes to homes is complex due to varied client capacities. While acknowledging potential metrics, they sporadically measure program outcomes, client visits, and file audits. ERO lacks a consistent system for data capture, analysis, and informed decision-making. Embracing the Baldrige framework and the BSC may offer a holistic approach, aligning short and long-term goals and enhancing operational efficiency. Utilizing U.S. Census data guides grant allocation, particularly in engaging the Asian population, a challenge due to cultural barriers. To address this, exploring tailored advertising mediums could be beneficial.

ERO primarily employs qualitative methods to assess program success, lacking systematic data recording. Emergency preparedness strategy, while following state guidelines, lacks regular audits. Concerns about homeless and disabled populations' access to medication and independence are growing statewide, yet coordination between parent and local affiliates remains unsystematic. Their supply chain management lacks monitoring and systematic oversight. Social enterprise management lacks proactive planning and performance scorecards for effective growth and revenue generation. Marketing strategies are limited to local resource fairs, indicating a need for consistent

business development efforts. The BOR plays a passive role, presenting a challenge in guiding enterprise growth effectively.

Figure 1 illustrates the exploration of organizational product and process result themes across the listed nonprofit entities. Each organizaiton's distinctive approach and operational focus are depicted, showcasing their strategies and outcomes in product development, service delivery, and overall operational processes. The figure offers a comparative visual analyis, highlighting the thematic commalilities and difeerence observe within the realms of product and process results across these diverse nonproft organizations.

Figure 1

Exploration of Organizational Product and Process Result Themes in Nonprofits
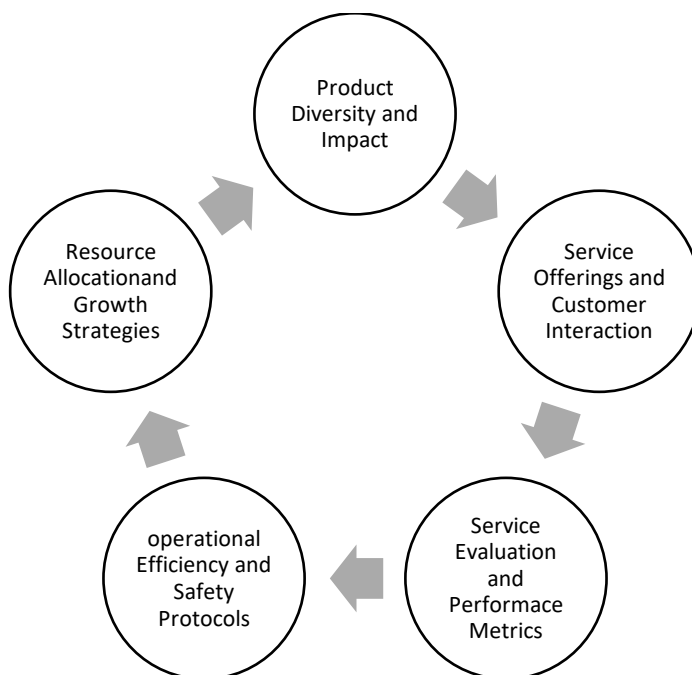
Customer Results

XYZ lacks a formal system to gauge customer satisfaction, relying instead on

SLs' estimations. Their customer-centric approach begins from the initial engagement,

where leaders meticulously elucidate services, processes, and testing metrics to assuage

any customer concerns. Moreover, they offer post-service feedback to elucidate

adjustments made for an improved disabled end-user experience. This customer-focused

ethos not only ensures ADA compliance but also advances digital equity for the disabled

community. While XYZ hasn't encountered customer dissatisfaction yet, its leaders

remain open to feedback and perceive any signal of disapproval as an indicator of

potential dissatisfaction. Despite employing various engagement methods, they generally

rate customer engagement highly. Despite occasional lapses in follow-ups, XYZ

endeavors to maintain enduring relationships with customers, aiming to convert new ones

into repeat clientele. Despite their dedication to customer satisfaction, there are

intermittent instances of inadequate follow-ups, reflecting an ongoing effort to refine

their customer engagement strategies.

TZA Company SLs actively engage with customers through diverse

communication channels like emails, discussions, staff meetings, and online feedback

platforms. These methods allow them to capture, monitor, and analyze customer

feedback, satisfaction, dissatisfaction, and retention levels. Stored information from these

interactions is shared among SLs for future reference, aiding in continuous improvement.

Utilizing emails, phone calls, in-person conversations, and online feedback mechanisms,

SLs consistently assess and track satisfaction and retention rates. Positive feedback

evident on social media platforms and the company website, including statements from girls and their parents, underscores high customer satisfaction. Electronic storage of received customer feedback enables SLs to highlight individual achievements through various communication channels, promoting these successes at schools and on social media. The effective use of listening tools like meetings, phone calls, emails, and social media engagement has been instrumental for TZA Company, providing valuable insights into customer sentiments. Incorporating this communicated information into promotional materials further enhances customer engagement, contributing to a holistic understanding of the customer experience.

ABC leadership has established an effective and efficient system for excellent customer services and listening to customer's needs. These systems were established with ABC mission and vision in mind. The leaders of ABC screen feedback from customers and follow industry trends to improve their future growth strategies. The most important growth step at this business location is opening a store where clients can purchase clothes and other items at a reduced cost. This has helped ABC to expand their brand and increase its customer base. ABC continues to impact the local community by helping to reduce unemployment and improve family's quality of life with the service they provide. To ensure this business location, to ensure they hear the voice of their clients, they use various platforms such as Facebook, Instagram, and the organization website.

ASD Foundation's senior leadership emphasized a profound commitment to aiding those affected by critical incidents, noting that this mission often becomes deeply personal when individuals encounter or witness such incidents. The Foundation has

witnessed a surge in engagement and support, evident through various metrics—

increased peer supporters, amplified social media presence, rising attendance in training

programs, book purchases, and CISM certifications. Utilizing a Likert-type scale

questionnaire, the Foundation receives favorable course evaluations, with an average

rating of over 4 out of 5 from instructors. Their expanding social media followership,

with Facebook nearing 5,000 and LinkedIn surpassing 500 followers, showcases a

positive trend, with high ratings from engaged followers. Additionally, the Foundation

played a pivotal role in advocating for legislation and recognition at national and state

levels regarding critical incident stress management, exemplifying its effectiveness. The

acknowledgment and endorsement of critical incident stress management by various

legislative bodies further solidify the Foundation's impact and the recognition of its

mission. The Foundation's efforts were instrumental in shaping laws and defining

protection measures for critical incident stress management, attesting to the widespread

recognition and acknowledgment of their endeavors in this crucial area. The Substance

Abuse and Mental Health Services Administration's recognition of Critical Incident

Stress Debriefing as evidence-based further validate the Foundation's approaches,

aligning with the goal of refining professional practices and achieving desired outcomes

in this critical domain (Rousseau & Gunia, 2016).

For MDM, fostering strong customer engagement and relationships aligns with

organizational success (Baldrige Performance Excellence Program, 2020). The nonprofit

demonstrated acute awareness of local needs by tailoring services to meet community

requirements. Notably, the organization engaged in targeted presentations, addressing

specific demographics such as K12 students, college attendees, and diverse consumer groups, even extending outreach to grocery shoppers. However, the pandemic-induced slowdown affected operations, prompting XYZ to aim for a resurgence within the nonprofit sector in 2023.

ERO employs client satisfaction surveys but faces a persistent challenge with a low completion rate, hovering around 5-10% according to the leadership. Various methods have been attempted, including mail, email, social media, and face-to-face requests at the conclusion of client visits, yet improvements remain elusive. While historically receiving positive feedback, the organization lacks a structured approach to capture, track, and analyze these outcomes consistently over time. This absence of a systematic process hinders their ability to derive evidence-based insights essential for shaping and refining their customer engagement strategies.

Workforce Results

XYZ lacks a formal performance measurement system for evaluating workforce performance. The assessment of workforce-focused performance results depends on the capacity of the workforce to achieve organizational objectives, as noted by senior leaders. Emphasizing an inclusive and supportive environment irrespective of abilities, the organization maintains a fully staffed team and ensures a conducive workplace. Effective communication methods and consistent engagement activities utilized by senior leaders contribute to strong workforce engagement results. These leaders prioritize constant communication using diverse mediums to gauge employee well-being and performance. Moreover, there's a notable improvement in XYZ's workforce and leadership

development initiatives. The encouragement and financial support for industry-specific training initiatives have resulted in enthusiastic participation among employees and leaders alike. In anticipation of increased workload, the organization plans to rely on temporary staff. Despite lacking a formal means to assess workforce climate, the leadership perceives it as healthy, gleaned from regular interactions and feedback channels established with the workforce. The leadership's open-door policy and encouragement of transparent communication foster a positive atmosphere and morale within the organization.

In the realm of workforce capability and capacity, TZA ensured a consistent team with each leader holding at least a bachelor's degree and having a background in lacrosse, spanning from middle school to college, along with specialized training as lacrosse coaches. They meticulously tracked and shared performance metrics among themselves and the BOD, seeking avenues for improvement by analyzing competitor data and emphasizing safety and coaching requirements. Lacrosse proficiency was a key requirement, and TZA Company leveraged clinics to forge relationships, generate revenue, and secure future fundraising efforts. The workforce's professional development was vital to the organization's success, with leaders actively engaging in broader nonprofit engagements during off-months, thereby elevating TZA Company's value through continuous improvement.

The leadership at this specific business location of ABC conducted a thorough review of workforce-related metrics encompassing safety, recruitment, and hiring initiatives. Considering indicators like staffing distribution throughout the organization

and employee qualifications essential for professional development, the leadership aimed

to gauge the workforce's capacity and capability, aligning with the principles outlined in

the Baldrige performance excellence framework (2018). An integral aspect of their

approach involved fostering a culture of trust by transparently sharing workforce

performance data and outlining future growth strategies to their employees. Engaging

extensively with their workforce, these leaders are committed to nurturing a genuine

organizational culture centered around employee well-being. Continuously assessing the

workforce's capacity and capabilities underscores the administration's dedication to

ensuring their team's readiness and competence.

The SL at ASD Foundation acknowledges the growing demand for Critical

Incident Stress Management (CISM), necessitating a continuous quest for innovative

methods to aid individuals impacted by critical incidents. This commitment extends

beyond a mere desire to assist, as the foundation actively develops responsive programs

to address these concerns. While the foundation's workforce exhibits the capability to

meet this surging demand, concerns arise regarding their capacity. Workforce capability,

defined as the organization's leadership and staff's proficiency in executing organizational

processes (Baldrige Performance Excellence Framework, 2017a), remains robust.

However, the workforce's capacity, reflecting the leadership's ability to ensure adequate

staffing levels for task completion (Baldrige Performance Excellence Framework,

2017a), requires reevaluation due to an extension of the foundation's core employees. To

navigate these challenges, foundation directors and staff adhere to the tasks delineated

within the 2016-2018 Strategic Management Plan, utilizing it as an action blueprint to

fulfill the foundation's objectives and mission. Regular interactions during weekly staff meetings and engagements with CISM teams and approved instructors are vital mechanisms employed by leaders and staff to provide essential assistance and ensure the students receive requisite CISM instruction.

The workforce-focused performance results encompass critical facets such as capability, capacity, engagement, and leader development within the framework of organizational excellence (Baldrige Performance Excellence Program, 2020). Within the MDM nonprofit organization, the composition primarily consists of the founder, a team of five board directors, and interns sourced from a local university. Notably, this structure mirrors a prevalent trend in the nonprofit sector, where the majority of such entities employ staff ranging between five to 20 individuals (Nonprofit Center, 2022). However, a significant challenge for this organization lies in its volunteer-based workforce, including the founder and interns, who balance their commitments with other day jobs. Consequently, the founder, responsible for the nonprofit's operations, cannot dedicate full-time attention to its functioning, compounded by the temporary status of the interns. This setup, unfortunately, inhibits the establishment of key performance indicators (KPIs) for the workforce, impacting the organization's ability to gauge and monitor its operational effectiveness.

The ERO's workforce remains relatively small, comprising a team of nine members, including the senior leader, emphasizing reliance on volunteer support for their outreach initiatives. With 10 full-time and one part-time staff, ERO structures its team

into four primary roles: management, independent living specialists, consumer change advocates, and social enterprise personnel.

Leadership and Governance Results

In assessing leadership and governance results, XYZ's organizational leaders prioritize fiscal, ethical, and social responsibility as fundamental benchmarks (Baldrige Performance Excellence Program, 2017a). While senior leaders perceive their communication and engagement with the workforce and customers as highly positive, there's acknowledgment of weak governance accountability attributed to the absence of an active BOD. Although the achievement of the organizational strategy and action plan is improving, some leaders exhibit hesitancy in executing plans that might affect the organization's reputation or financial stability, reflecting a cautious approach to implementing strategic initiatives.

At TZA, the SLs emphasize effective communication and engagement strategies within the organization. SLs effectively track organizational strategies through stakeholder communications and internal assessments, leveraging past performances and relationships to guide future plans, which highlights the interconnectedness of workforce performance, action plan achievements, and BOD involvement in the success of TZA Company initiatives.

At ABC business location, the absence of a formal governing board places the responsibility for oversight and policy development squarely on the executive director. The organization employs defined metrics for assessing leadership communication, ethical client engagement, staff interactions, and regulatory adherence. Adopting best

practices and robust business processes, this business location maintains a semi-operational Facebook presence, engaging in collaborative community services and hosting resident meetings across the high desert communities in Southern California.

The ASD Foundation's SL plays a pivotal role in overseeing the organization's strategic direction, implementing the 2016-2018 Strategic Management Plan, and considering various feedback sources like financial data, student attendance, emerging analytical insights, and input from both students and instructors. These leaders engage consistently with directors and staff, fostering open communication and regular status checks through daily, weekly, and periodic face-to-face or telephonic updates. The CEO actively participates in meetings, including the founders' gathering, where activities and suggestions related to critical incident stress management are discussed. Governance, laws, and ethics are managed through well-defined by-laws aligned with state corporation regulations, ensuring adherence to internal operating laws. The board exercises oversight through regular meetings, the potential formation of committees, and the appointment of an advisory board. The CEO and executive director are appointed by the board and hold fiduciary responsibilities. Compliance with tax requirements, annual IRS filings, and conflict of interest policies are fundamental, underscoring transparency and ethical conduct. The ASD Foundation also boasts a GuideStar Gold Seal of Transparency, showcasing a commitment to providing essential organizational details for stakeholders and researchers. Additionally, maintaining accreditations with various institutions like UMBC and professional associations is a cornerstone of the foundation's credibility and quality assurance in program delivery.

MDM, being guided by its founder and a small BOD, operates within the legal framework stipulated for nonprofits in Idaho. Although the board's involvement is limited due to the organization's size, MDM emphasizes ethical behavior and stakeholder trust, which are integral in the nonprofit sector. Enjoying a strong community trust, MDM has fostered partnerships with local businesses and schools, contributing significantly to societal welfare. Its initiatives, like the Grocery Shopping Tours & Presentation, not only educate consumers but also add value to the community by offering insights into consumer goods packaging and enhancing grocery shopping experiences. The services provided by MDM positively impact stakeholders within the local area, reflecting its commitment to community betterment and engagement.

The leadership at ERO maintains an open-door policy, welcoming engagement from employees, clients, and stakeholders. Despite fostering a familial atmosphere, the organization lacks a structured approach to monitor and enhance governance and leadership continuously. Compliant with IRS guidelines, ERO submits annual 990 tax forms and undergoes financial oversight and auditing processes. However, the financial reports lack depth, impeding detailed program performance assessment and variance analysis. While valuing stakeholder input, ERO lacks a systematic tracking system for ethical behavior, continual improvement, and societal well-being alignment. The transition from paper to electronic record management could aid in tracking outreach effectiveness, yet a comprehensive approach to measure organizational performance and improvement across periods is absent. The strategic plan lacked detailed action steps and measurable goals, hindering the leadership's ability to evaluate the plan's success and

adapt to market changes promptly. Establishing a more rigorous system to track progress and adapt strategies may foster a more agile and responsive organizational environment.

Financial and Market Results

The financial and market results at XYZ are appraised as effective by SLs, who rely on diverse funding sources, including service fees, speaking engagements, and contributions from supporters. Refer to this figure (i.e. See Figure 2). A substantial 80% of the charitable funds are channeled into supporting programs for people with disabilities, specifically targeting the blind, visually impaired, and print disabled. The remaining 20% supports administrative needs, website maintenance, marketing endeavors, and participation in relevant conferences and conventions. XYZ extends its services to governmental agencies, corporations, nonprofits, and community-based organizations on a national and international scale, measured through secured service contracts, developed partnerships, provided training sessions, and successful grant acquisitions. Additionally, senior leaders emphasize non-financial outcomes like roundtable discussions, industry events, podcasts, and global conferences, such as the United Nations International Day of Persons with Disabilities in 2018, as essential in advocating and creating global awareness. While acknowledging opportunities for enhancement in financial and marketing performance, the organization's decade-long existence is perceived as a testament to their achievements in these domains.

It's evident that TZA Company's BOD prioritized the establishment and implementation of budgets with SLs, directing the treasurer to oversee budget monitoring for resource allocation. SLs utilized the OPR and SPP to evaluate financial efficiency and

effectiveness, recognizing the need for flexibility in budgeting and fiscal alignment, crucial for sustaining funding. This funding was crucial to provide various services like lacrosse programming, tutoring, and mentoring for middle and high-school girls, which SLs managed to raise approximately $6,000 annually to support.

Regarding marketplace performance, comparisons with similar youth organizations highlighted sustained growth in youth, volunteer, and workforce participation, offering valuable insight into strategic planning for TZA Company's SLs. To bolster its market competitiveness, TZA Company can enhance its adaptability by employing strategies identified through a SWOT analysis, enabling them to navigate rapid internal and external changes more effectively. This adaptation will enable them to strengthen their position in the competitive market as a nonprofit organization.

The business leaders at ABC are deeply attentive to their organization's financial and market outcomes. They've implemented robust measures to meticulously track both financial and market performance, evident through indicators gauging economic performance, market success, and strategic execution. Despite encountering challenges inherent to financial goals, such as program-related objectives and company purposes, ABC consistently achieves its annual targets encompassing cost efficiency, grants, partnerships, and donor acquisition. Continuous monitoring of strategic initiatives underscores their commitment to executing scheduled plans, consistently attaining their implementation goals. While achieving a revenue budget of USD 595,000 in 2018 the organization boasts impressive returns on investments. For instance, every dollar invested in family-related initiatives yields a threefold societal return, notably reducing the

dependence on public assistance, increasing taxable earnings, and realizing savings through crime reduction. Similarly, each dollar directed towards early childhood nurturing and education reaps substantial social cost savings of up to tenfold.

The ASD Foundation faced dire financial straits, nearly becoming insolvent in 2013 with liabilities close to exceeding assets. However, a new CEO's appointment sparked a transformative shift, leading to increased revenue, expanded services, and reduced expenses, allowing the foundation to avert insolvency. This turnaround saw significant improvements in liquidity, program service revenue diversification, and reduced administrative costs, marking a remarkable rebound from previous years of financial crisis triggered by external events like the aftermath of September 11th.

Since 2013, ASD Foundation's strategies focused on revenue diversification, notably within program service revenue streams, introducing initiatives like regional conferences, online training, and the Speakers Bureau. Despite heightened program service expenses and increased liquidity ratios, the foundation maintained prudent financial health, consistently registering net income surpluses, positive operating margins, and a stable revenue-to-expenses ratio. This strategic shift, while neglecting immediate policy enhancements, steered the foundation towards sustainable financial growth and stability, marking a remarkable resurgence from the brink of financial collapse in previous years.

The financial and market landscape of nonprofits, exemplified by MDM, pivots around key metrics such as charitable donations, grants, and the introduction of new programs or services. In Idaho, nonprofits witnessed a median annual revenue of

$149,719 in 2022, while XYZ aimed for a $25,681 target revenue in 2018, encompassing diverse income sources including donations, corporate and individual gifts, events, and earned income. Despite this, the organization encountered a substantial gap from its projected budget of $82,557.32, necessitating an expanded outreach and increased program offerings, reliant on augmented funding through donations or grants from public or private sources. Over the past two decades, individual donations have emerged as a growing revenue source for Idaho nonprofits, underscoring the significance of diversified funding streams for sustainability. Acknowledging the paramount importance of financial stability, MDM must leverage multiple revenue sources and swiftly adapt strategies to engage millennial donors amidst the evolving landscape, marked by a surge in nonprofit numbers and the influence of social media, posing a challenge for MDM to remain relevant and enhance its donor base.

The leadership team at ERO currently lacks a clear strategic framework to steer their initiatives aligned with the 2014-2017 strategic plan. While they regularly review financial reports on a monthly and bi-monthly basis, the strategic direction emphasizing the identification of new funding sources hasn't been comprehensively executed. Although efforts to diversify funding sources away from government grants by expanding the social enterprise have shown some success in revenue growth, detailed financial analysis to determine their impact remains lacking. The absence of a deep dive into financial reporting to ascertain surplus or deficit hampers the team's understanding of the actual implications and challenges arising from these endeavors.

The application of the BSC methodology could greatly benefit ERO, enabling the incorporation of both financial and nonfinancial metrics for comprehensive assessment and alignment with short- and long-term objectives. Presently, financial performance is monitored at a basic level, with no apparent tracking of nonfinancial metrics. Moreover, the overreliance on a single employee to manage the day-to-day operations and expansion of the social enterprise poses a risk to sustainability, especially in the event of senior leaders departing without a structured approach for integrating the social enterprise operations back into the nonprofit's operations. A systematic approach and integrated strategy are imperative for ERO's continued viability and resilience beyond the current leadership.

Figure 2

Comparative Analysis of Financial and Market Performance Across Nonprofit Organizations: XYZ, TZA, ABC, ASD, AND ERO
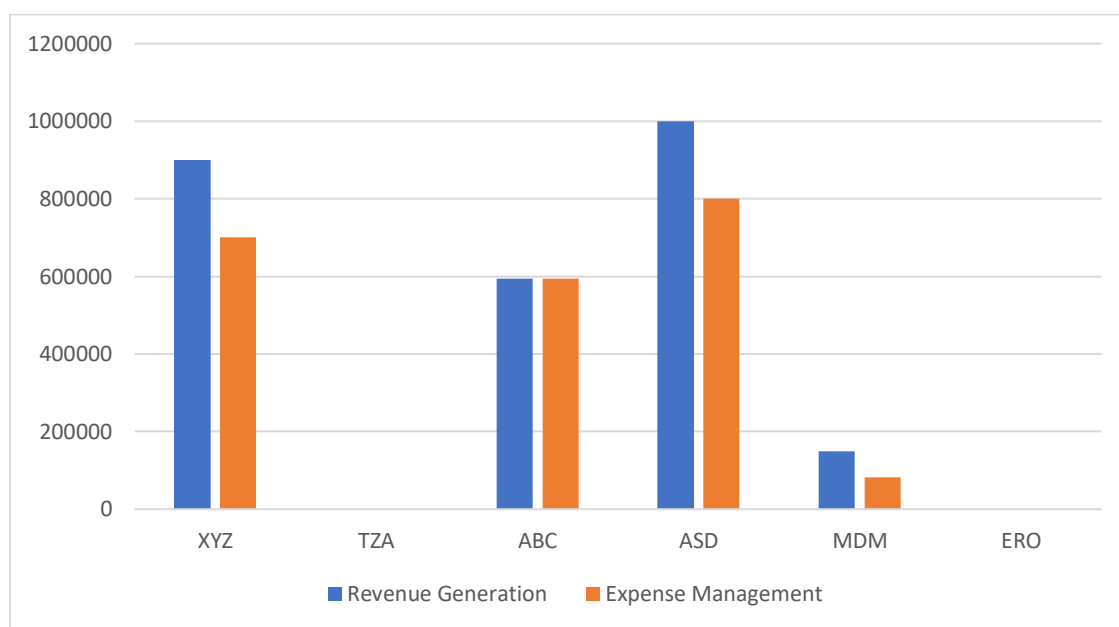
Key Themes

Process Strengths

The examination of XYZ's process strengths reveals three primary areas of excellence: persistent advocacy for the organization's mission and vision, strategic planning firmly rooted in the organization's values, and strong community connections. Leadership involvement stands out as pivotal for effective strategic planning, evident through consistent efforts by XYZ's senior leaders to promote the organization's mission and vision persistently. This persistence creates a sense of purpose and direction among staff members, aligning with scholarly assertions that a clear vision empowers individuals within an organization. Furthermore, XYZ's profound connection to the disabled community, demonstrated by their commitment and impactful advocacy, showcases a compelling engagement with societal issues. This is evidenced through their collaboration with various entities, such as airlines and online grocery services, to promote accessibility for individuals with disabilities. These initiatives align with scholarly research emphasizing the importance of shared understanding and vision within a community, demonstrating XYZ's efforts to positively impact the societal and economic aspects of the disabled community.

Process Opportunities

Upon scrutinizing the operational landscapes of XYZ, TZA Company, ABC, the ASD Foundation, MDM, and ERO, three common themes emerge as pivotal areas requiring refinement and enhancement within their processes. Firstly, a distinct need exists across these organizations to standardize operational procedures and introduce

formalized performance evaluation systems. This echoes the necessity for structured approaches to assess employee performance objectively and streamline day-to-day operations. Secondly, the integration of strategic planning with operational processes is a prevalent opportunity among these entities. Embedding continuous improvement cycles, budgetary processes, and comprehensive tools for management can bolster alignment between strategic goals and day-to-day actions. Lastly, fostering a culture of learning and development surfaces as a shared opportunity, vital for long-term organizational resilience. The emphasis on refining leadership approaches, establishing learning frameworks, and nurturing a culture of collaboration and knowledge sharing stands as a collective need across these varied organizations. Addressing these common themes can significantly fortify their operational frameworks, aligning their processes more effectively with organizational objectives and fostering sustained growth and resilience.

Results Strengths

Within XYZ, two central result strengths emerge: workforce engagement and innovative product development. The organization's success is underpinned by an inclusive work environment fostering high employee retention rates, showcased by leaders' dedication to employee welfare. This approach resonates with Lawton and Páez's assertions regarding the impact of leader prioritization of employee welfare. Furthermore, XYZ's adeptness in developing groundbreaking products and services through strategic collaborations, like with Intuit Inc., exemplifies a transformative leadership approach, contributing to value creation. At TZA Company, robust SL stands as the cornerstone, driving strategic decisions informed by comprehensive customer engagements and a

commitment to continuous improvement. This is evidenced through their utilization of PDCA principles, embodying a customer-centric approach. Similarly, ABC showcases resilience and adaptability, ensuring swift adjustments amid industry shifts. Strong leadership involvement within the community enhances business visibility and drives successful outcomes, as observed in the thrift store initiative. The foundation ASD's strengths lie in financial management and educational programs, evidenced by increased membership and high feedback scores in their courses, reflecting growing engagement. MDM exhibits strengths in leadership expertise and effective programs, benefiting from their founder's commitment to environmental conservation. Lastly, ERO's strength lies in revenue analysis but lacks a structured approach to consistently capture performance data for continuous improvement.

Results Opportunities

The identified results opportunities within XYZ highlight the need for a structured approach to evaluating customer satisfaction and the establishment of an active BOD (see Table 3). While the organization sees positive trends in social media interactions, the absence of formal surveys hinders accurate measurement of customer satisfaction. Moreover, the inactive BOD creates a governance gap, impacting the organization's accountability and oversight. For XYZ to enhance its operations effectively, implementing comprehensive customer satisfaction surveys and recruiting an active BOD remain imperative. At TZA Company, recommendations focus on engagement diversification, competitor analysis, and deeper understanding of competitors' strengths. ABC's opportunities lie in enhancing leadership development, evaluating customer

satisfaction metrics, and planning for future workforce needs. The ASD Foundation aims

to reverse declining attendance, improve data management, and conduct member

retention surveys. MDM faces challenges post-COVID-19, seeking to rebuild

connections, increase brand awareness, and adapt to shifts in consumer behavior. Lastly,

ERO needs a holistic approach to integrate learning and improvement processes aligned

with the Baldrige framework, emphasizing the importance of systematic evaluations

across all organizational criteria.

Table 3

Board of Directors Status Across Six Organizations: Active Versus Absent

Organization	BOD status
XYZ	Absent
TZA	Absent
ABC	Active
ASD	Active
MDM	Active
ERO	Active

Project Summary

The purpose of this qualitative meta-analysis study was to explore strategies

nonprofit organization leaders use to support financial change management in an

organization for sustainability. The population for this study comprised of previously

published Walden University doctoral studies that focused on the need for effective

strategies to maintain long-term organizational and financial health in the United States.

Utilizing the technique of meta-analysis, this study involved systematically reviewing and synthesizing the findings of multiple independent studies on the topic.

I served as the secondary data collection instrument. In determining the inclusion of previously approved doctoral studies, I utilized Walden's online database as a primary resource. In the context of a qualitative meta-analysis, my role was to aggregate and synthesize findings from the primary qualitative studies, aiming to interpret and develop new insights and theories. The selection process involved employing nine meta-analysis guiding questions (see Appendix) to discern studies that aligned with the systematic, purposeful, and meaningful exploration required for my research. I meticulously navigated through Walden's online database which resulted in the identification several process strengths, process opportunities, results strengths, and results opportunities. The key thematic findings were robust communication and stakeholder engagement, mission alignment and dedication, and a prevailing culture of continuous improvement and learning.

Contributions and Recommendations

Nonprofit organizations have undergone a transformative shift in their societal role, exerting substantial influence on contributions, scale, and operational challenges that impact society at large. These entities not only contribute to societal well-being and mission fulfillment but also enhance their managerial capabilities, as noted by Lyons (2020) and Stecker (2014). Disruptions in financial management and sustainability, encompassing earned income, government funding, charitable donations, and investment incomes, can lead to malfunctions in service delivery and organizational competencies

for public program and service support (Johnson et al., 2020). The significance of sustainable business designs for long-term success, as emphasized by Johnson et al. (2017), underscores the critical role of leadership in shaping sustainability efforts. Factors such as business-nonprofit engagement, website utilization, and personnel knowledge further contribute to the dynamics of organizational success. Defining and understanding organizational success within the context of nonprofit organizations involves considering strategic competencies, image, advocacy, goal measurement, innovation, and strategic planning. Challenges arising from inadequate strategic competencies, leading to uncertainty and problems, as highlighted by Black et al. (2007) and Stanley (2020), underscore the complexity of achieving success in nonprofits. Success in the nonprofit sector is intricately woven with organizational image, effective advocacy, and various attributes contributing to its identification, aligning with the perspectives of Pereira de Castro Casa Nova et al. (2018) and Zhang & Guo (2020). The dynamic interplay of elements, including organizational image, effective advocacy, and strategic approaches, determines nonprofit success. Implementing goal measurement as an instrumental tool facilitates aligning actions with desired outcomes. Additionally, innovation and strategic planning emerge as key drivers of success, especially in challenging environments, as noted by Malkus (2011) and Strang (2018). This comprehensive exploration of success factors is essential for sustaining organizational excellence within nonprofit entities, allowing for methodical examination to foster successful management and long-term viability.

Implications for Social Change

The contribution of this study to positive social change is that results may catalyze and facilitate sustainable long-term organizational health, particularly within emerging markets. The insights gleaned from this research offer invaluable practical knowledge for nonprofits and small business owners seeking to gain a competitive edge, optimize available resources, foster sustainability, and propel growth within their respective sectors. By effectively implementing the strategies derived from this study, nonprofit leaders can significantly enhance services, thereby directly benefiting community stakeholders through improved offerings and support systems.

Recommendations for Action

Moving forward several recommendations emerge from this study for future implementation. Firstly, there is critical need to identify and seize opportunities for improvement within nonprofit leaders' strategies aimed at nurturing long-term organizational and financial health. This involves a deeper understanding of small business and nonprofit organizational structures, leadership paradigms, strategic planning methodologies, robust analytical frameworks, and the intricate dynamics of nonprofit reliance on funding sources. Additionally, grappling with the challenges inherent in funding while striving for sustainability in resource insecure environments demands focused attention and strategic adaptation strategies.

The implementation of sustainable financial change strategies holds substantial promise for both small businesses and nonprofit organizations, offering a pathway towards enduring organizational health and sustained viability. I will disseminate the

findings derived from this study through scholarly literature, conferences, and targeted training initiatives, which represents a pivotal step in equipping leaders within these sectors across the United States with valuable insights. The widespread application of this study's outcomes stands to significantly benefit institutions, allowing leaders to effectively navigate financial change management while ensuring the long-term health and sustainability of their organizations. By harnessing the information gleaned from this research, leaders can proactively steer their entities towards robust financial practices, fostering organizational vitality and resilience in a dynamic economic landscape.

Recommendations for Further Research

The current study contributes significantly to the literature on sustainability strategies for long-term organizational health, particularly in the context of financial change management within nonprofit organizations. A systematic review and analysis of Walden-approved studies revealed three key thematic findings, providing a valuable foundation for future research in this area. However, certain limitations must be addressed in subsequent studies. The adoption of a multistudy approach requires rigorous measures to ensure the validity and reliability of data across diverse studies. Additionally, there is a risk of publication bias, and the absence of direct comparisons between data from multiple Walden University studies should be acknowledged. Selection bias, resulting from the deliberate case selection, also needs careful consideration. Future research endeavors could focus on similar strategies employed by leaders in other small nonprofit entities, exploring nuanced approaches to enhance financial change management for sustained organizational vitality and resilience. The identified pillars of

success, such as robust communication strategies and proactive stakeholder engagement, align with existing literature, emphasizing their critical role in organizational sustainability and success.

<div align="center">**Application to Professional Practice**</div>

The application of the findings from this study holds significant promise for advancing professional practice in nonprofit leadership. By incorporating the insights obtained, nonprofit leaders have the opportunity to strengthen and secure the enduring health of their organizations. Embracing these findings establishes a foundation for adeptly managing financial changes, creating an atmosphere conducive to long-term sustainability and organizational vitality. The definition of success becomes paramount, encompassing elements such as organizational image, effective advocacy, and various attributes contributing to its identification, as emphasized by Pereira de Castro Casa Nova (2018) and Zhang & Guo (2020). The positive impact of goal measurement on leaders' actions and engagement further underscores the importance of integrating these research-derived insights into the practices of nonprofit leaders.

<div align="center">**Reflections**</div>

Embarking on the journey of doctoral research presented formidable challenges yet proved immensely rewarding, particularly as I pioneered a qualitative meta-analysis study, a first within my university's academic landscape. This endeavor demanded stepping beyond my comfort zone, seeking consistent guidance, and ensuring adherence to stringent study requirements. The intricacies of each section, notably the amalgamation of evidence from six previously approved Walden studies in section 3, posed unique

challenges. However, this complexity was essential for presenting evidence to guide nonprofit organizations towards achieving long-term organizational health and sustainability through adept financial change management. As the researcher, maintaining objectivity and setting aside potential biases was imperative to rigorously gather and analyze the necessary data for the study. The process not only bolstered my confidence in extracting, scrutinizing, and evaluating pivotal insights from multistudy contexts but also deepened my appreciation for nonprofits and their leaders. Understanding the substantial effort required to navigate financial change management within the constraints of limited resources has provided valuable insights, shaping a newfound respect for the dedication of nonprofits in sustaining long-term organizational health and vitality.

Conclusion

This qualitative meta-analysis study sought to delve into the nuanced strategies employed by nonprofit organization leaders in navigating financial change management for sustainability. The findings underscore that there is no one-size-fits-all solution or singular strategy for achieving this complex goal. Instead, the path to long-term sustainability amidst limited financial resources necessitates strategic collaboration with diverse entities to foster funding diversification. The imperative of diversifying funding sources is highlighted, serving as a buffer against fluctuations in available funds and ensuring resilience. A key takeaway is the significance of aligning strategic approaches with the organization's essence and mission, laying the groundwork for future funding sources. While acknowledging the starting point for nonprofit organizations and leaders, the study emphasizes the iterative nature of the process, emphasizing the importance of

learning from past experiences and adapting to evolving circumstances. This cyclical approach proves vital, especially concerning funding growth options, encompassing earned income, government funding, grants, charitable donations and gifts, and investments – all contributing synergistically to the long-term sustainability and success of nonprofit entities. Consequently, nonprofit leaders are called upon to take action by fostering collaboration and implementing innovative methods, thereby ensuring the survival and enduring sustainability of their organizations amidst the dynamic landscape of financial change management.

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Appendix: Meta Analysis Guiding Questions

What strategies do nonprofit leaders use to support financial change management in an organization for sustainability?

Meta Analysis Guiding Questions

1. What strategies do organizational leaders use to maintain long-term organizational and financial health?

2. What strategies do organizational leaders use to implement design for maintaining long-term organizational and financial health?

3. What strategies have organizational leaders used in the past for financial change management?

4. How do organizational leaders identify financial opportunities?

5. What performance goals do organizational leaders use to develop and maintain long-term organizational and financial health?

6. How do organizational leaders use performance indicators to evaluate the effectiveness of organization strategies for maintaining long-term organizational and financial health?

7. How do organizational leaders engage financial change management for maintaining long-term organizational and financial health?

8. Based on the organizational experiences, what are the key issues that were addressed that likely contributed to the ongoing sustainability of business?

9. What additional elements, comments, or information does the organization present regarding maintaining long-term organizational and financial health?