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Social Enterprises and Evidence-Based Practices of Sustainable Development

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This is to certify that the doctoral study by

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has been found to be complete and satisfactory in all respects,
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Walden University
2024

Abstract

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MBA, Ashford University, 2012

BS, Upper Iowa University, 2009

Research Project Submitted in Partial Fulfillment

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Abstract

Some managers of social enterprise organizations lack strategies to improve business operations and profitability in a social business inside a private market. Social enterprise managers must implement successful strategies to improve business operations and profitability; otherwise, businesses may fail, causing a loss of jobs, increased social injustices, and weakened communities. Grounded in the competing values framework, the purpose of this qualitative pragmatic inquiry was to explore strategies used by managers of social enterprises to improve business operations and profitability. The participants comprised six social enterprise managers who implemented successful strategies for at least 3 years to improve business operations and profitability. Data were collected using semistructured interviews and public documents and were analyzed using thematic analysis. Three major themes emerged: financial well-being, sustainability, and community involvement. A key recommendation is for social enterprise managers to implement artificial intelligence technology to improve service efficiency, reduce costs, and strengthen financial sustainability. The implications for positive social change include the potential to save money, create jobs, and increase revenues. Segments of the population prospectively benefiting from successful strategy implementation include workers with disabilities, persons who are unemployed, and persons from other disadvantaged backgrounds.

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Dedication

My success in completing my doctorate would not have been possible without the support and nurturing of my grandparents, Ralph and Glenda Rogers, who were responsible for implanting the seed of knowledge in my mind and nurturing it. To my wife for always believing in me, no matter what hair-brained idea I have. To my children, Kennedi and Ian, near or far, you're always in my heart. You make the world a brighter place just by being you. To myself, may you continue to pursue a sustainable world for future generations relentlessly, one enterprise at a time. And to the Earth, may we endeavor to keep a future for you, to be good stewards of what you provide, and always to shepherd your resources in a meaningful and sustainable way.

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Section 1: Foundation of the Project

Background of the Problem

Some government agency managers have been unable to adequately handle socially tailored enterprise issues and are looking to commercial markets for private market solutions that have a social mission (White et al., 2022a). However, conflicting demands from society and corporate stakeholders make maintaining traditional organizational integrity difficult (Eiselein & Dentchev, 2020). Managers of the Small Business Administration (SBA; 2021) have reported that social enterprise establishment rates are at the lowest in 10 years, reducing social enterprise job creation from 4.1 million jobs in 2006 to 2.5 million jobs in 2015. Social enterprise job creation reductions could affect the economy significantly and manifest in many noticeable outcomes.

Although prior studies have predominantly examined the consequences of regulatory focus and ethical leadership within the context of managers and subordinates, there has been limited exploration of enterprises with a social mission, and their unique traits play a pivotal role in influencing the growth of small businesses (Slavec Gomezel & Stritar, 2023). White et al. (2022a) found that managing an organization's commercial goals requires a different and unique set of skills than managing a social mission. Managers making decisions inside social enterprises offer the opportunity for commercial financial sustainability that can respond to the world's social problems (Kwong et al., 2023; Tong et al., 2023). For an enterprise to succeed in achieving goals and offering

financial sustainability, its managers and employees must manage conflicting demands simultaneously (White et al., 2022b).

Shahriar et al. (2019) found that a link exists between traditional corporate philosophy and the ills of society, such as unemployment, rising disparities of income, malnutrition, and a polluted environment. Some inequalities are multidimensional and include income, education, and other indicators of socioeconomic qualities (Esteban & Lorena, 2022). Social enterprise managers create a significant opportunity for their organizations to create valued customer experiences and reduce social inequalities (Esteban & Lorena, 2022). There is a general paucity of studies involving the skills and strategies required to manage a sustainable social enterprise. In all forms of social enterprises, managers must reconcile the tensions of social purpose and market, which raises important questions about the dynamics of these managers' strategies as they pertain to sustaining the social enterprise (Esteban & Lorena, 2022). Social enterprise managers who had previously operated in enterprises without a social mission use finance strategies established from nonsocial enterprise management, which predominantly prevail as a reliance on habits and practices learned from their time spent in nonsocial mission-driven enterprises in which the social enterprise managers have operated previously (Tiffany & Benjamin, 2022). Tiffany and Benjamin (2022) stated that social enterprise managers do not seek conventional business loans or equity financing because they survive in resource-poor environments through improvisation and recycling

capital. The background to the problem has been provided, and the focus will now shift to the business problem focus and project purpose.

Business Problem Focus and Project Purpose

Some managers of social enterprise organizations lack strategies to improve business operations and profitability in a social business inside a private market. The purpose of this qualitative pragmatic inquiry study was to explore strategies used by social enterprise managers to conduct business in the private sector with a social mission while simultaneously improving commercial viability The target population for this study was six social enterprise managers who have implemented strategies in a private market to conduct a social mission-driven business in the Midwestern part of the United States. Purposeful nonprobability sampling was used as the method to select a small sample size of six participants who were eligible based on their knowledge and experience managing a social enterprise for at least 3 years to help me address my research question. My access and data source for this research project was social enterprise managers who associated themselves with conducting social business through the Social Enterprise Alliance professional association, which is an online database of social enterprise professionals who have conducted a social mission in a private market. The conceptual framework for this study was the competing values framework (CVF). First established by Campbell in 1977 and furthered by Quinn and Rohrbaugh in 1983, the CVF framework is one of the top 40 business models ever created (Cameron & Quinn, 1999), and it has been used to categorize the trade-offs, tensions, contradictions, and paradoxes that inherently occupy

organizations and their managers. Researchers formulated CVF from their investigations regarding indicators of organizational effectiveness (Quinn & Rohrbaugh, 1983). In this study, I used CVF principles to help me deconstruct the paradox of social mission and private enterprise profitability.

Research Question

What strategies are used by social enterprise managers to improve business operations and profitability?

Assumptions and Limitations

Assumptions

Assumptions are facts considered to be true but are not actually verified. Assumptions carry risks and should be treated as such. Assumptions in academic literature support clear and rational thoughts and information (Marshall & Rossman, 2017). Three assumptions guided this research study. First, the participants, being social enterprise managers, represented the population faced with the challenges of this study. Second, I assumed, for the purpose of this research, that the participants in this study answered the questions honestly to the best of their ability, and they were not subject to external influence. Third, different skills or strategies were needed to conduct business as a social enterprise versus a business directed at profitability with no social mission as a part of its purpose for existence. Assumptions carry risk, and validation mitigates those associated risks, which vary by study (Ross & Zaidi, 2019). I validated these assumptions during the interview process and throughout the study.

Limitations

Limitations refer to potential weaknesses of the research. Limitations in academic literature represent the potential shortcomings of a study that could disrupt the trustworthiness of the findings (Poncelet et al., 2020). First, this pragmatic inquiry study included only the factors in this study, and any unwillingness of the participants to share the full extent of the challenges and obstacles faced when addressing social business strategies posed a limitation. Second, social business is a niche application of a wide array of available business models. Strategies that business managers in social businesses used to remain sustainable did not prove to be representative of other business models. Third, the brief specified period of the face-to-face interviews and brevity of the study did not allow the observation of participant body language, potentially diminishing rapport, and trust (see Ross & Zaidi, 2019), which is why I conducted interviews using Zoom. Fourth, the research included the experience and knowledge of the participants. Lastly, the geographical area of the study may not apply to other regions with different economic challenges, levels of employment, and opportunities. A study conducted over a more extensive time, with different cases and regions, could yield a more thorough analysis. All efforts were made to assess and eliminate bias among the participants.

Transition

In Section 1, I provided an overview of how managing an organization's commercial goals requires a different and unique set of skills than managing a social mission. Managers making decisions inside social enterprises offer the opportunity for

commercial financial sustainability that can respond to the world's social problems (Kwong et al., 2023; Tong et al., 2023). For an enterprise to succeed in achieving the social goals of helping people and offering financial sustainability, its managers and employees must manage conflicting demands simultaneously (White et al., 2022b).

In this overview, I covered the problem statement, purpose of this study, research question, conceptual framework, assumptions, and limitations of this study. In Section 2 and Section 3 of this study, I cover the review of the literature and research project methodology, a transition to my research findings, and in Section 4, I cover the conclusions, findings, and recommendations of this study.

Section 2: The Literature Review

A Review of the Professional and Academic Literature

Opening Narrative

The review of the literature included peer-reviewed scholarly literature from multiple databases. A comprehensive review of social enterprises resulted in a gap in the research regarding strategies used by social enterprise managers. Social enterprise managers may have a specific skill set that might be an enabling factor of social business sustainment. Social enterprise managers can lead social enterprises with goals of becoming sustainable or traditional organizations with a social enterprise transition strategy. The review also provided an understanding of what social businesses are, what social enterprise goals and outcomes are, and social business processes. The research question addressed what strategies may be required to conduct business as a social enterprise. The identification of strategies should provide business managers with new knowledge as it relates to operating a social enterprise and selecting employees who can operate social business processes within the enterprise. The application of this knowledge could lead to more successful, sustainable business outcomes.

I examined peer-reviewed articles, dissertations, and business books related to the stated business problem. The articles and dissertations were from Emerald Management Journals, Business Source Complete, EBSCO, SAGE, Emerald Insight, and Google Scholar. Keywords in the search included *competing values framework, social business strategies, social business processes, social processes, competitive advantage, social*

enterprise, social marketing, social media and IT processes, leadership, qualified social leader, social business, and *successful leadership.*

In the literature review, I found four major themes that emerged: (a) business culture, (b) leadership skills and strategies, (c) social technology, and (d) the Quinn Rohrbaugh model. The organization's environment and culture are broken down into pairs of competing priorities. Leader skills and strategies have wide variations and applications. During the review, the researcher must identify these strategies as they relate to the themes. Technology alone does not make or break a company; however, technology being used by a manager in their strategies may become very powerful and need to be acknowledged as such. Due to the competing and complex culture within organizations, the Quinn Rohrbaugh model is a lens through which the researcher can view the competing components that comprise an organization's culture and processes. The themes include (a) business culture, (b) leadership skills and strategies, (c) social technology, and (d) competing resources. These themes are reflected in the model below.

I reviewed 152 journals, business websites, government websites, doctoral studies, and books. The review of the 152 sources of data resulted in 167 unique references. This resulted in 91% of publications within 5 years that were peer-reviewed. The literature review contains 129 total references, and 107 were peer-reviewed within 5 years, for a total of 86.1%. The literature review references used are broken down in Table 1.

Table 1

Synopsis of Peer Reviewed Sources in the Literature Review

Reference type	> 5 years	< 5 years	Total	< 5 year %
Peer-reviewed articles	4	107	111	96.4%
Business books	5	6	11	
Doctoral studies	0	1	1	
Government cities	0	6	6	
Totals	9	120	129	86.1%

Conceptual Framework: CVF

Characterizing the individuals within an environment allows the researcher to categorize culture, environment, and readiness for change, which are often overlooked (Kwon & Kim, 2020). The CVF has been subject to extensive psychometric testing and validation (Valenzuela-Garcia, 2023). The CVF also provides the researcher with a means of characterizing individual and organizational management (Quinn & Rohrbaugh, 1983). These authors summarized the primary competing values component of the CVF as the ability to perform the multiple roles and behaviors that circumscribe the requisite variety implied by an organizational or environmental context. The work of Quinn and Rohrbaugh has also been used by modern day researchers such as Otike et al. (2022) in value addition to organizations.

Moreover, Abu Tayeh and Mustafa (2021) used the CVF to classify managers and the paradox they manage to understand organizational values, leadership, and motivation. In addition, Jamali et al. (2022) used the CFV to define leadership complexity and define effective leadership, and they used the CFV to identify business strategies across a full

range of manager styles. There are many strategies within management that have different impacts on performance and culture (Arabeche et al., 2022).

The paradox of social business involves contradictory yet interrelated elements that exist simultaneously over a long period (de Mon et al., 2022). A central tenet of the CVF is that it does not presume that strategies or methodologies are mutually exclusive, and a leader may possess opposing strategies simultaneously, though they may choose to use them in only specific situations. Cameron and Quinn (1999) solidified the current interest in paradox as paradoxical leadership and ambidextrous organizations persist in social enterprises (as cited in de Mon et al., 2022).

The paradox of business is that organizations must be adaptable and flexible yet stable and controlled in alignment with leadership skills and strategies used by managers (Quinn & Rohrbaugh, 1983). Case study evaluations frequently use logic models, initially to express the theoretical causal relationships between an intervention and its outcomes and then to guide data collection on the same topics (Yin, 2018). Through an analysis of social enterprises, commercial organizations, and hybrids within the academic literature, two central tenants emerged: (a) the strategies or skills of the managers and employees in an organization should align with one another, and (b) the competing values within an enterprise of serving a societal inadequacy and still maintaining financially sustainable operations should be balanced with one another. These competing values are central to the CVF framework (Quinn & Rohrbaugh, 1983). The strategies used by managers of social enterprises may span the continuum across all three major components of the

Quinn Rohrbaugh model. The Quinn Rohrbaugh model applies to both organizations and leadership within organizations (Jamali et al., 2022).

The focus of my study was to identify strategies of successful social enterprise managers. Certain strategies may lead to the successful transformation of traditional organizations or increased ability to sustain social enterprises. The CVF framework and subsequent research contain several characteristics from which I can view the effectiveness and description of research surrounding social enterprise manager strategies. Cameron et al. (2022) published a book called *Competing Value Leadership*. In this model, the authors contrasted individuality and flexibility versus stability and control. They also contrasted the form of an organization as either collaborative and controlling or creative and competitive.

The clan refers to a team, group, and esprit de corps among collaborators; adhocracy is the ability of people to numbly collaborate in new, creative, and innovative ways; market is the ability to focus on results, achievement, and attention to the competitive landscape and external positioning; and hierarchy is the ability to create and maintain structures and systems that support organizational control and learning (Cameron et al., 2022). Diametrically using Figure 1, the characteristics of the leader or the organization can be charted. However, critics of this model have argued that it is more descriptive than prospective and confusing to some people (Hartnell et al., 2019). These authors stated that efforts to connect culture with its system correlates have proceeded independently without integration. This trend is problematic because it raises

questions about the strength of culture's association with its system correlates, and it casts uncertainty about organizational culture's predictive validity for organizational outcomes relative to other elements of an organization's system.

Through a quadrant analysis, major indicators of effective organizations are focus, preference for structure, and means and ends are described (Quinn & Rohrbaugh, 1983). Organizational focus is a measurement between internal emphasis on the well-being and development of people in the organization and the well-being and development of the organization. Organizational structure is a measurement between the stability of the spectrum and flexibility. Organizational means and ends are used to measure the emphasis on the important process compared to final outcomes (Quinn & Rohrbaugh, 1983). Based on the dimensions of Quinn and Rohrbaugh's framework, R. E. Quinn (2011) went on to generate an organizational culture assessment instrument that is used to identify the preferred and perceived culture profile based on core values, assumptions, interpretations, and leadership approaches that characterize organizations. Social business managers may have strategies, skills, or tendencies that fall within these three themes as they relate to business approaches and outcomes.

The CVF framework provided a framework for this study of what best strategies may be needed to conduct business as a social enterprise. Quinn and Rohrbaugh (1983) defined effective leadership as the ability to perform the multiple roles and behaviors that circumscribe the requisite variety implied by an organizational or environmental context. The CVF framework was developed based on research surrounding major themes of

effective organizations. The major themes are leadership, organizational focus, organizational preference for structure, and organizational means and ends or strategies that managers use to accomplish goals and objectives. Organizational focus is a measurement between internal emphasis on the well-being and development of people in the organization and the well-being and development of the organization. Organizational structure is a measurement between the stability of the spectrum and flexibility and creativity of the staff. Organizational means and ends are the strategies managers use to measure the emphasis on the important process compared to final outcomes (Quinn & Rohrbaugh, 1983). Small business managers may have skills and tendencies that fall within these three themes as they relate to business skills and outcomes.

Weber et al. (2022) identified that organizations of all kinds can be tracked and monitored in their process of innovation and change to understand the organization's type of culture, leadership, and organizational strategy adopted. These authors identified there are many tools used to examine leadership and employee perceptions and opinions about their working environment, but only a few like the CVF framework examined the values and beliefs that inform those views. The sustainability of companies such as Coca-Cola, Disney, General Electric, Microsoft, Sony, and Toyota is due in part to their distinctive cultures rather than their financial capabilities (Cameron & Quinn, 1999). Cameron and Quinn also identified that the CVF approach can help the researcher to view the conditions that give rise to the costs of mediating exchanges between managers such as organizational goal incongruence and performance ambiguity.

The paradox of business is that organizations must be adaptable and flexible yet stable and controlled simultaneously. This paradox is complicated further within social enterprises because there is an added dimension of strategy and skill that a leader must apply in balancing between business and social decision making for the organization. The Quinn Rohrbaugh model has been applied to both organizations and leadership within organizations. The focused application of the CVF framework on social business leader strategies was of interest to me as the researcher because of its application to my research question.

Through an analysis of social enterprises, commercial organizations, and hybrids, a central tenant repeatedly emerges within the literature as the type and skill of the managers and employees inside an organization. A second tenant is the competing values within an enterprise of serving a societal inadequacy and still maintaining financially sustainable operations. These competing values are central to the CVF framework and provide a window for which to view the complex phenomenon under study (Quinn & Rohrbaugh, 1983).

Work on the CVF framework has proceeded since Quinn and Rohrbaugh's initial studies. The CVF model has been validated (Frost et al., 1989) and used to study executive leadership and overall enterprise effectiveness. Cameron's et al. (2022) research has suggested that effective executives are capable of balancing and performing contradictory and complex roles. Research conducted by Alrowwad et al. (2020) also suggested that executives can play multiple and competing roles produce a better firm

performance. The researchers empirically tested the CVF model and the associated roles, which provided further support for the model.

The CVF framework and the research derived thereof have several characteristics from which I could view the effectiveness and description of research surrounding social enterprise leader best strategies. First, they are related to leader strategies and subsequent outcomes of effectiveness and sustainability. Second, the inherent paradox of social enterprises has a complex perspective on the effectiveness of leadership within the contradictions of the social enterprise. Third, leadership effectiveness can be delineated into roles, conflicting problem orientation, and management skills and behavior within the organization (Rickley & Stackhouse, 2022). The focused view of these three perspectives could be used to support managers and organizations adopting strategies of effective social enterprise managers.

The characteristics of the CVF are related to the leader's strategies and subsequent outcomes of effectiveness and sustainability (Rickley & Stackhouse, 2022). The inherent paradox of social enterprises has a complex perspective on the effectiveness of leadership within the contradictions of the social enterprise (Quinn & Rohrbaugh, 1983). Leadership effectiveness can be delineated into roles, conflicting problem orientation, and leadership strategies and behavior within the organization (Rickley & Stackhouse, 2022). The focused view of these three perspectives could be used to support managers and organizations adopting strategies of effective social enterprise managers.

Enterprise Types

Social Enterprises

Social entrepreneurship is a new form of business focused on the creation of

social value for its beneficiaries, whether for- or not-for profit (Kruse et al., 2023). Social

enterprise survival is at stake in pursuing the dual mission of social and economic growth

in this country's economy (Makeel et al., 2022). The importance of reconciling social

enterprise growth and sustainability through the shaping of a management approach

along with a performance-based social supportive culture will be important. Strategies

and improvements made by managers of social enterprises should be focused on

channeling efforts toward real problems and achieving meaningful results (Izzati et al.,

2023). Social business is a conceptualization addressing social and environmental

problems sustainably through business venture (Yunus et al., 2010). Social enterprises are

designed to include the bottom tiers of underprivileged society members, whereas most

commercial business managers seek to serve primarily the middle and upper tiers of the

market. Ferrara et al. (2023) showed in their study that drivers towards collaboration

positively impact new employment opportunities and social security for social

entrepreneurs and the most fragile people targeted by the social enterprise services while

conversely the lack of resources and low embeddedness are the main dimensions

hindering social businesses. Targeting the bottom tier allows the underprivileged to serve

in market-based economic activities. Economic inequality, particularly in the areas of

income and wealth, has been steadily expanding in the United States (Nijman & Wei, 2020).

Many issues have been raised by researchers about collective obligation, there have been progressively integrated ambitions aimed at decreasing social issues coupled with unfriendly environmental impacts of a company (Mwemezi, 2023). Yunus (2007) proposed a new model of business he deemed the social business. Yunus described a market-based business formed around the pursuit of primarily social and environmental goals aside from solely economic gain. The primary premise is the proactive and deliberate harnessing of market-based approaches to address worldly social problems. Kandulu et al. (2020) presented a positive contribution to social business enhancement on society by documenting reductions in poverty lifestyles and increased education beginning with the introduction of microcredit loans.

Yunus (2007) identified that social business is a cause-driven business and reasons that poverty is not created by the poor but is a result of the corporate strategy. Upon the realization that there is a link between many ills of society and corporate philosophy, such as unemployment, rising disparities of income, malnutrition, and polluted environment, alternative practices have been identified (Kandulu et al., 2020). Business researchers like Yunus and Sardana, have suggested increased focus on practicing social business within enterprises.

There are seven guiding principles to social business as originally defined by Yunus. The seven guiding principles are (a) the objective of the business is to overcome

poverty, or one or more intractable problems of society, (b) social business must be financially and economically sustainable, (c) investors receive a return on investment that does not exceed the amount of their investment, (d) when the borrower repays a loan all profit remains with the company for additional expansion and improvement, (e) the business must be environmentally conscious, (f) the workforce should get market wages with better working conditions and (g) employees, and managers need to enjoy what they do (Yunus, 2007).

While factors may differ from country to country, Izzati et al. (2023) identified the following common themes in successful social enterprises: training, funding and grants from companies, accreditation, relationships among social entrepreneurs, university students as potential social entrepreneurs, addressing social problems, building a community for support, incubation and acceleration, and education.

To survive in the duality of the social enterprise, managers utilize entrepreneurial ecosystems to share information and learn best practices (Ratten, 2023). Resources such as governmental institutions, corporations, and investors are seeking to measure and compare social value creation with regards to social entrepreneurship and program evaluation (Li et al., 2022). Exley (2020) considered it a nearly impossible challenge to compare value creation of different, unrelated heterogeneous interventions. In a study by Jalil et al. (2023) that included the interaction of psychological capital, social capital, and entrepreneurial attitudes these authors found that the exploration of social capital and social entrepreneur attitudes has received little attention. Researchers have noted Kroger

and Weber had developed a conceptual framework to compare social value creation of

different and unrelated interventions. Using subjective satisfaction ratings, Kroger and

Weber provided a single uniform measurement across different sectors that gauge

performance and compare social interventions (De La Cruz & Spanjol, 2021). These

different and unrelated interventions served different needs of different treatment groups

in different socioeconomic contexts. Bhattarai et al. (2019) stated market orientation and

disruptiveness improve both the economic and social performance of the social

enterprise.

Sparviero (2019) conducted research that resulted in a conceived design for the

organizational settings of social enterprises in resolving the mission measurement

paradox and for meeting the strategy of the social enterprise. Rawhouser et al. (2019)

stated that the tools to value the social impact are underdeveloped while Spieth et al.

(2019) believed that the value drivers of hybrid organizations are (a) responsible

efficiency, (b) impact complementarities, (c) shared values, and (d) integration novelties.

Social entrepreneurs have many different motivations to open a social enterprise. Lehmen

et al. (2023) identified three motivational factors in the life cycle of a social enterprise

including essential factors, building factors, and solidifying factors. Essential factors are

the main difference between social and traditional enterprises and are found throughout

the lifecycle of the social enterprise while the other solidifying factors are distributed

throughout the same lifecycle (Lehmen et al., 2023).

Hybrid Organizations

There were many legal structures in which social enterprises may operate including profit, nonprofit, and mixed entity structures (Ismail & Johnson, 2019). Hybrid organizations were unique in their need and ability to cascade nonprofit and profit legal structures. New categories of businesses were available within the United States and the United Kingdom in response to requests from social entrepreneurs and their allies to help meet the unique needs of hybrid organizations (Ismail & Johnson, 2019).

Hybrid organizations generated income and attract capital consistent with for-profit models, non-profit models, or both (Mitzinneck & Besharov, 2019). Social mission pursuing commercial business models were hybrid organizations (Bauwens et al., 2020). Tykkyläinen and Ritala (2021) generally defined a hybrid organization as those enterprises that design their business models based on the alleviation of a social or environmental issue.

Despite the evidence of social impact, researchers suggested that hybrid organizations are fragile because they run the risk of internal tensions and mission drift due to incompatible goals (Tykkyläinen & Ritala, 2021). The natural and specific type of work hybrid organization conducted gave rise to different types of organizations that needed to manage operations and strategies in different ways. The challenge of social business hybrids was the alignment of activities that generated profit with activities that generated social impact. The researchers identified that hybrid organizations operate by the dimensions of automatic value spillovers and contingent value spillovers. Contingent

value spillovers were increases or decreases in value to economic agents outside a specific transaction. Automatic value spillovers happened when hybrids help areas overcome such problems as the inability to pay, difficult to access, and unwillingness to pay (Tykkyläinen & Ritala, 2021). Santos et al. (2015) identified four different types of hybrids: (a) market hybrids are BOP initiatives for access to basic services such as energy and health, (b) blending hybrids are microfinancing or other models that require regular support or change of behaviors for value creation, (c) bridging hybrids are integrated business models with job matching for people with disabilities, and (d) coupling hybrids are work integration social enterprises.

Hybrid managers primarily sought to initiate change to alleviate or compensate for a particular social or environmental problem (Ometto et al., 2019). The ability to create a mission-driven business that is financially viable in the wake of drifting missions, leadership changes, or fierce competition was needed to be able to sustain a hybrid organization. The researchers believed that the ability of hybrid managers to develop innovative business models and strategies that balance the risk of mission drift with the risk of financial insolvency was vital (Ometto et al., 2019). There is, however, a dearth of research that considered the interactions between hybridity, the cross between two types of enterprises, and scaling, being the business growth in revenue and social impact (Bauwens et al., 2020).

Business Studies

In a study by Demir and Kocaoglu (2019) using McKinsey's 7S's, when social business is adopted and integrated into the work processes of employees, social technologies can enhance financial performance and market share. Employee overall perception of the company's social mission had a positive effect on the business outcome of the social enterprise (Cheema et al., 2020). However, in a review by Palil et al. (2023) of prior studies that claimed social enterprises had a positive social impact reported little evidence to support that matter. Palil went on to explain and eventually defined the definition of social impact from different perspectives.

A survey of 44 senior managers presented that 86% believed that company pro-social behavior will not affect product performance; while the remaining 14% split between positive and negative impacts (Cheema et al., 2020). Commercially driven models have proven effective in creating economic growth and social prosperity; an example of this is the commercialization of mobile telecommunications providing reduced poverty, economic empowerment, and economic growth (Tang, 2022).

Social business processes provided the opportunity to improve communication, collaboration, and information within the enterprise. Enterprise managers could leverage the power of social to strengthen the resiliency of the business to establish and maintain a social enterprise. Managing a social enterprise required unique skill sets and strategies beyond what is needed to achieve a standard set of commercial goals (Mitzinneck &

Besharov, 2019). Certain strategies may be required to conduct business as a social enterprise (Gupta et al., 2020a).

Leadership Skills and Effect on Firms

Leadership Skills

Policy, process, and legal structures chosen by social managers has implications for both the enterprise and stakeholders. The ability of social enterprises to meet consumer needs is dependent upon leadership ability to develop specific business skills (Makeel et al., 2022). Social enterprise research offers little insight into the skills and strategies that enable social managers to attend to the competing demands of simultaneous social and commercial goals (Gupta et al., 2020a). Loss of just one key manager could cost a company millions of dollars due to loss of critical marketing and client knowledge (Roumpi et al., 2020).

Periods of environmental instability, crisis or major change bring increased uncertainty and anxiety, which intensifies the need for leadership (Weaver, 2020). The ability for firms to meet consumer needs as social enterprises is dependent upon the abilities of managers to develop applicable business strategies (Roy & Hazenberg, 2019). Powell et al. (2019) found that managing an organization's commercial goals requires a different and unique set of skills than managing a social mission. The nature of the desired social change and the sustainability of the organization and its services are two key factors that affect the decisions and behaviors of social enterprise managers (Valenzuela-Garcia, 2023).

Vision and Foresight

Arias-Perez et al. (2020) conducted a study around the mediating effect of knowledge management strategies and capabilities and innovation performance. The researcher's results showed that only the personalization strategy has a partial mediating effect on organizational performance. Alnuaimi et al. (2021) identified that technical innovation is mastered by those enterprises that know how to learn and store the appropriate knowledge and that developing collective intelligence and achieved purpose is essential to be an intelligent organization. The last finding was that the mobilized resources and understanding environment had a positive correlation to an enterprise's technological intelligence. Obeso et al. (2020) investigated the relationships among knowledge management practices on enterprise performance and analyzed the mediation role of organization learning. The researchers found that knowledge generation and knowledge flow promote firm performance while there is not a direct association between knowledge storage and enterprise performance. Palil et al. (2023) identified there are varying strategies used to measure social impact such as balanced scorecard (BSC), social return on investment (SROI), and cost-benefit analysis (CBA).

Understanding and Adapting

The role of leadership in social enterprise growth has received very little attention (Kimakwa et al., 2023). A small business leader's ability to understand and adapt to situations may be a factor of leadership effectiveness. Skills such as formulating a problem correctly, reading complex situations quickly, understanding risks versus reward

in a social situation, determining the root cause of a social problem, making realistic assessments of situations, and understanding the real issue involved may be critical strategies to run a business effectively (Rahim et al., 2021). The situational response may manifest in many ways including adapting appropriately to different situations, responding to crisis situations effectively, knowing how to adapt to a new work environment, deciding to begin problem-solving, and making quick decisions to deal with routine matters (Rahim et al., 2021).

Emotional Intelligence and Value Creation

Cognitive empathy, also known as emotional intelligence, is the ability to read how an individual is feeling, know what an individual is thinking, understand moods, understanding non-verbal cues, and knowing when people are disguising their true feelings (Rahim et al., 2021). Social skills can manifest as how a person is comfortable with different people, manage with equal ability men, women, and children, interact appropriately with a variety of people, negotiate well to reach agreements, and build and maintain positive relationships (Rahim et al., 2021).

Employees, Skills, and Effect on Social Enterprises

Hired Skills

In 2014, social enterprise investments represent 0.02% of the $210 trillion of business investments and in 2016, a revised report was published in which the board reported that of the $2.5 billion allocated from 28 organizations for social impact, 65% of that went to social enterprises of which 81% was inside the United States (Social Impact

Investment Task Force, 2023). Roy and Hazenberg (2019) believe that the ability for firms to meet consumer needs as social enterprises is not only dependent upon the abilities of managers to develop applicable business strategies but of employees. Pareja-Cano et al. (2023) discussed that employees may be able to learn how to use similar skills they have learned in private entrepreneurship to develop a type of social entrepreneurship. The need for education programs to synchronize with the industry is essential as university graduates consistently lack problem solving and communication skills while showing a higher propensity for conceptual understanding, and higher levels of creativity and cultural context (Fernandes et al., 2022). Vocational education training programs had more practical skills and knew how to apply them better. Universities increasing the involvement of industry partners coupled with providing insights on the practical benefits of the project learning create an opportunity for university students to connect with the industry, aside from the traditional internship (Fernandes et al., 2022).

For a leader to be effective, employees need appropriate knowledge, strategies, and abilities to fulfill commitments to the change is needed (Kane et al., 2019). Social business employees have a significant opportunity for their organizations internally and externally to create valued customer experiences (Tykkyläinen & Ritala, 2021). Managers who embrace social business processes within the enterprise enhance the financial performance and the market share of the company (Manzoor et al., 2020; Tajvidi & Karami, 2021).

Competency

Magesh Kumar et al., (2020) stated that the business environment social enterprises operate in today is a result of the continuous fundamentals changes in technology and markets. Better innovation performance competency is needed for firms to become more adaptable (Magesh Kumar et al., 2020). Suriyankietkaew et al. (2022) found evidence that a social enterprise may need to comply with several categories of sustainable leadership competencies to varying degrees: (a) strategic, (b) systems thinking, (c) interpersonal, (d) anticipatory, and (e) ethical competencies. The critical sustainable practices found by Suriyankietkaew et al. (2022) were as follows: (a) enabling human capital with care for stakeholders, (b) fostering ethical values and norms via altruism, (c) cultivating social capital through social innovation, (d) supporting pro-environmental behavior and social responsibility to achieve inclusive growth sustainability and resilience. In a study by Geier et al. (2021), The researcher investigated the relationship between employee competencies, information technology applications, operations strategy, and business performance. In the article, operations strategy was described by the four competitive priorities of quality, flexibility, cost, and delivery. The findings indicated a significant, positive relationship between employee competencies such as responsible leadership, teamwork, high motivation and good educational background, and operations strategies of low cost, quality, and flexibility. With regards to IT applications, the study concluded that retail technology applications such as POS, EDI, barcode and ERP help firms to develop a flexibility strategy.

Employee Effects on Firms

Individuals seem to be rapidly adopting social media platforms and practices. Those employees are often the catalyst for success; however, that success is not achieved through the actions of a single employee (Roy & Hazenberg, 2019). Horizontal networks are environments to share practice and experience on how to run and improve the business; and development of a social network enables information and knowledge exchange (Ryan et al., 2019).

Ryan et al. (2019) identified that companies are trying to determine how to utilize tools such as social media to reach consumers who engage in social sharing daily. Social media is changing how employees and consumers communicate with each other and these cooperative inter-firm relationships rooted with social capital are important levers for market acquisition. The embedded nature of social opportunities provides a competitive advantage over investor-owned firms (Ryan et al., 2019). The current literature on social media clearly demonstrates the benefits of increasing competitive knowledge using social medias for all types of organizations (Sparviero, 2019).

Clauss et al. (2019) explored the roles that business model innovation had with firm agility and performance. The authors research showed a positive connection between business model innovation and strategic agility and is strengthened by the degree of economic turbulence; while value creation and value proposition innovations have a positive effect on firm performance, value capture innovation has a negative effect. The identified leadership skills and managerial strategies significantly lead to business model

innovation, whereas the interaction between managerial skills and managerial ties inhibited business model innovation (Clauss et al. (2019).

Themes and Processes Strategies

A study by Francois and Hoe (2023) identified there could be a connection between widespread collaboration of stakeholders in the startup phase of a social enterprise and could increase awareness of responsible consumption and be converted into consumers for sustainability. This type of engagement may change behaviors and shows that society can take on dual roles as users and collaborators to scale the social impact. A social business fund is a financial instrument to assist micro-entrepreneurs. Social business funds significantly affect social entrepreneurs' income when added to training and support services (Ferdousi et al., 2023).

Leadership Effect on Social Enterprises

Strategies and Skills

Prior to the COVID-19 worldwide pandemic, lack of management skills or strategies are among the factors that cause failure of 30 to 50 percent of small businesses (Alsaaty et al., 2016). Achieving societal impact often requires multiple stakeholders with diverse backgrounds and motives to coalesce and leadership of the enterprise influences firm performance (Lumpkin & Bacq, 2019). Although periodic downturns have happened in the past, it is estimated that around "half a million firms are at risk of collapse" (Cook & Barrett, 2020) due to the pandemic alone. Managers making decisions inside social enterprises offer the opportunity of commercial financial sustainability that can respond

to the world's social problems (Bacq & Lumpkin, 2021). However, Golbspan Lutz et al. (2023) stated that managing an organization's commercial goals requires a different and unique set of skills and strategies than managing a social mission. Managers making decisions inside social enterprises offer the opportunity of commercial financial sustainability that can respond to the world's social problems (Golbspan Lutz et al., 2023).

Social and Psychological Capital

Business success may be in part based on the leader's ability to amass social capital and attract critical resources through those networks. Small business managers use networks to contribute to social capital by using them as means to access other individuals who control resources of value to the business leader (Jalil et al., 2023). Ryan et al. (2019) identified social capital as the driving factors of innovativeness, organizational advantage, and value creation. As revenue and employee numbers grow, firms derive less from the social capital due to network membership and instead create value through competent business interactions (Wu et al., 2022).

Kaasa (2019) identified that individualism had a positive relationship with perceptions of structural and cognitive social capital; however, individualism was not related to perceptions of relational social capital. Perceptions of structural and cognitive social capital can be applied to an employee, acting within social business activities with self-interest only, which will not be as strong as they might be otherwise (Kaasa, 2019).

Social capital may have value as a tool. Social capital is the information and advantages a person has been empowered with because they are the person of record or know the person of record in a situation. This resultant social capital value results from the connection an individual can make dependent on the needs of currently disconnected people or organizations (Ganguly et al., 2019). Kaasa (2019) found that individual characteristics influenced the development of social capital and subsequent utilization of such within a business. Choi and Chang (2023) explored the impact of psychological capital on social capital and civic engagement. In reviewing the components of efficacy, optimism, hope, and resilience on social performance. The researchers found positive relationships between optimism and hope to social performance of social enterprises and that social engagement enhances the positive relationship between hope in social entrepreneurs' psychological capital and the social enterprise social performance (Choi & Chang, 2023).

Innovation Capital

Alvino et al. (2021) conducted a literature review including learning orientation, innovation capital and firm performance and found that open-mindedness, shared vision and intra-organizational knowledge sharing have a positive effect on innovation capital and that innovation capital has a positive relation to firm performance. According to results by Bayraktaroglu et al. (2019) innovation capital has a unilateral effect on structural capital efficiency and profitability. Depending on the manager's ability to bring innovation capital to the enterprise; thus, if research and development increases expenses

the effect on the innovation capital profitability also increases (Bayraktaroglu et al.,

2019).

Strategic Planning

Strategic planning, as a practice, has become widespread globally. Evidence from

multiple studies has proved strategic planning is effective (Kabeyi, 2019). Improvement

in strategic planning practice will continue to occur within the practice (Biondi & Russo,

2022). Historically, integration of social and environmental value along with customer

value has been lacking (Panda et al., 2020).

Market Planning

Enterprise (2020) identified that the social enterprise marketplace is at least three

times larger than previously estimated. Bandyopadhyay and Ray (2020) identified that

social enterprises have different challenges when compared to the marketing practices of

conventional businesses. The wide variety of stakeholder expectations and resource

constraints on the social enterprise created additional problems. Additional constraints

such as manager's legacy mindsets and lack of marketing skills limit the impact of social

enterprises (Bandyopadhyay & Ray, 2020).

Liao and Huang (2021) identified that choices of marketing channels have

matured and are present in two primary channel strategies. The integrated channel allows

for non-profit organizations to sell products or services using internal departments. A

decentralized channel allows the organization to sell through a for-profit retailer. Many

large corporations have adopted social media as a means of marketing while many small

organizations have been slow to broach the social media arena (Liao & Huang, 2021).

Enterprise (2020) pointed out the overall business environment is turbulent and as social

enterprises seek a foothold; they require strong leaders and managers. The managers must

articulate vision the enterprise employees can rally around and create conditions that

enable digital maturity, attracting talent, and bringing out the best in that talent's work.

Tools

The abacus is one of the oldest computers in the world (Jayasuriya & Sims, 2023).

As time progressed, society saw the invention of the punch card loom by Jacquard and

now the Internet. Since World War II, scientists have used information technology for

communicating and publishing, controlling and remotely accessing equipment, collecting

and analyzing data sets, solving equations numerically, and simulating, visualizing, and

recognizing patterns (Jayasuriya & Sims, 2023). Blockchain and Artificial intelligence

(AI) is now the new frontier that mankind is moving forward to that has the prospects of

significantly changing how we conduct our business and how costs can be reduced by the

downsizing of our labor force and workers. We may find that more social enterprises may

actually be needed in all countries because of the effects of both AI and the mass

migration of people from poverty and high-crime areas. Having the right tools can make

a tremendous difference in how work gets done and how many people are needed to do

this work (Jayasuriya & Sims, 2023; Volini et al., 2019).

Employee Recruitment

For a leader to be effective, employees need appropriate knowledge, strategies, and abilities to fulfill commitments to the changes needed (Kimakwa et al., 2023). Academics and business leaders are trying to make social enterprise sustainable. A Crosstab survey commissioned by Microsoft found that 79% of hiring managers in the U.S. review candidate's online profiles while 75% of companies have policies in place for hiring managers to conduct this type of review (Kumar et al., 2020). Managers are using social media sites to recruit job candidates who align more closely with the company values (Bae & Fiet, 2023). Organizations require the ability to create efficient talent management systems to respond rapidly and effectively address changing business needs (Pareja-Cano et al., 2023). The three primary stakeholders in social enterprises competing logic are better when cross-sector employees are engaged (Bae & Fiet, 2023). LinkedIn had 300 million members in 200 countries while Facebook had 1.11 billion active users each month in 2013. Approximately 751 million Facebook users are mobile, up 54% from 2012 (Facebook, 2023; LinkedIn, 2023).

Large organizations' rapid adoption may be in part due to large companies having the resources to create a comprehensively aligned marketing plan whereas many small business managers must go it alone (Liao and Huang (2021). Social media sites are not only for marketing a product or service anymore; companies are using social media sites to recruit job candidates who align more closely with the company values (Benedict et al., 2019). Russomanno et al. (2019) identified that social media among adults in the

United States has increased from 21% in 2008 to 69% in 2018. The members use social media to connect with peers, engage with news, intake content, and share information.

Facebook is the leading social media network with 1.5 billion active members equating to 78% of adults aged 30 to 49 and 64% of adults between ages 50 and 64. Given the increased popularity of social media platforms, enterprises are using social media to recruit employees (Russomanno et al., 2019).

Smith and Anderson (2019) identified that social marketing increased a firm's reach by 169%. Russomanno et al. (2019) support the Smith's and Anderson's findings and indicate that blogs and social media information provide insight and value related to competitors and marketing.

Brick and Mortar or Virtual Locales

Kimakwa et al. (2023) stated the application of leadership theory may help social entrepreneurs manage the environmental risks, dual mission, and legitimacy issues of social enterprises. Traditional business managers have historically believed the firm needed physical locations to launch or expand the reach of the business (Grzegorczyk et al., 2021). Business owners may now believe their business web presence is more critical than a brick-and-mortar institution. From 1996 to 2016, workforce mobility has risen. Over 30% of employees stay with their employers for less than two years while more than 50% depart within 5 years with the average being 4.6 years for an employee to stay with a company (SBA, 2021). Employee turnover is a significant cost to large businesses as well as SMEs. Loss of productive, well connected, and engaged employees have direct

costs estimated to range from 25% to 500% of the employee's salary with the average being $33,000 (Chiat & Panatik, 2019).

Information Technology

Information Technology (IT) has evolved over time. Social networking sites around the world have grown exponentially and have drawn people's attention (Del Giudice et al., 2019). Companies use a digital strategy to solidify the opportunities, advantages, and strategic insights offered by social tools and networks (Del Giudice et al., 2019). We can engage with customers in such a timely and relevant manner that the relationship can deliver increased customer insight and engagement that is fundamental to sustained business performance (de Oliveira Santini et al., 2020). The digital strategy needs to be comprehensive and competitive. Lehdonvirta et al. (2021) recommend developing a strategy for using the selected social media tools.

A study conducted by Ilmudeen et al. (2019) focused on the importance of the alignment of IT with business objectives. Ilmudeen et al. (2019) analyzed the IT business theoretical models available in current literature and identified that an organization's business infrastructure and strategy will impact the IT infrastructure and strategy. The author described business IT alignment as the appropriate and timely application of IT, in harmony with business objective, strategy, and requirements. The conclusion of this paper considered IT as a critical factor for the achievement of the organization's goal. Further research should examine if this model applies to any organization regardless of

its size, particularly because small and medium size organizations may not have extensive resources for IT.

Social Media

Large companies are using social media sites to monitor employee activities. With the advent of mobile computing, employees have access to email, text, and other messaging capabilities anytime, anywhere. Employers may have tasks requiring employers to keep safe and productive workplaces. Some employers could use social media to monitor their employees or may even ban mobile messaging activities altogether (Mazzarolo et al., 2021). Social media sites are not only for marketing a product or service anymore; companies are using social media sites to recruit job candidates who align more closely with the company values (Mazzarolo et al., 2021). The focused social media tool strategy affects every business process across the company portfolio and should be synonymous with the brand. Leadership within the enterprise can create an identity for the enterprise using social media tool strategies and allowing crowdsourcing, public opinion, and customer feedback to be part of the overall brand image (Harrison & Johnson, 2019).

Information Technology Strategy

Vidmar et al. (2021) explored the impact of the implementation of technology strategy on business sustainability, particularly in the post-recession and found the implementation of technology strategy requires a commitment to financial and human

resource strategy. Kwon and Kim (2020) conducted a literature review and identified that networks and infrastructure support are key components of catalyzing employee success.

Traditional Technology Processes

Vidmar et al. (2021) believe the management of technology is a basic function of businesses, and there is a close relationship between technology strategy and business sustainability. Increasing competitive knowledge by a firm's employees using social media is beneficial to the firm's competitive advantage (Mazzarolo et al., 2021). Wang et al. (2021) indicated that IT capabilities appeared to have a positive impact on environmental strategies, and such IT supported strategies could turn into business profits.

Kumar et al. (2020) presented that cloud computing is the ideal location for future information technology based on users' demands and the resources that can be provided on the internet due to changing workloads, automatic scaling of critical resource management, low cost and cultivating resource utility, and workload prophecy scheme.

Social Technology Processes

The premise of a social business process is that the social computing space is open, public, and transparent. Management support plays an important role in shaping the firm's service innovation related strategies and decisions. The firm must also foster a new mindset toward managerial control of information, people, and ideas (Hsu et al., 2019). Whether deciding between tagging versus folders or flat versus hierarchical, the strategy may require different skills. These new skill sets show promise in topic research,

avoiding rework, finding assets that can be used, building presentations quickly, mining

data, and much more (Phillips et al., 2019). Social innovation processes provide the

opportunity for development and growth of social enterprises (Gupta et al., 2020b).

Achieving the promises of social media, internally and externally, is a complicated

process, requiring specific personal skills and capabilities (Kwon & Kim, 2020). Socially

experienced firms regard social networks as significantly influencing economic growth

and expansion in many ways (Enterprise, 2020).

The social business process enabled firms to follow a different model of

engagement and require new ways of thinking, sharing, and collaborating. With this

knowledge, it takes a different skill set than those with a traditional way of thinking (Hsu

et al., 2019).

Bhagu et al. (2023) stated that knowledge gained regarding customer behaviors,

attitudes and mood will help drive benefits throughout the value chain of the

organization. Using social media tools and networks in businesses fosters an open and

collaborative environment that leads to creativity, openness, an agile mindset, and

innovation (Kruse, 2020).

A leader may develop an understanding of the differences between social and

digital strategies through the development of an adequate corpus of e-learning and social

learning. Bhagu et al. (2023) identified that the content of social learning and e-learning

production and consumption make up the primary differences. With internal and external

social business learning people share knowledge, expertise and skills with others and

learn the value of the competencies through networks that require social media content and network activity from the member. The member must turn that content into shareable learning objects whereas e-learning is learning done via a digital means and may be conducted alone.

Review of Literature Summary

After my review of the conceptual framework in Section 1, I covered the literature review in Section 2, which consisted of social businesses, hybrid organizations, leadership, and essential skills for success. The review uncovered emphasis reconciling social enterprise growth with sustainability and discussed Yunus's (2007) guiding principles for social businesses and continuance in their success.

In Section 2, I also included a discussion of social impact and funding of social enterprises, leadership, technology, and the evolving leaderships landscape. In my review of the literature, I also discussed the potential impact of stakeholder collaboration on responsible consumption, the role of information and social technology in business sustainability and innovation, and touched on leadership's influence on social enterprises, strategic planning, market planning, tools and technology, social media, and various types of capital.

Transition

In Section 2 of the Review of Literature within this doctoral study, I covered the basis of the need for a study of social enterprise leader's strategies. There is a definite challenge as it relates to conflicting needs of the social enterprise to be both financially

sustainable and cure one or more ills of society. In Section 3 of this study, I cover the role

of the researcher in depth, how I conducted research ethically, and how to protect

participants within the study while conducting the research. In Section 3of this study, I

also cover the project management methodology used.

Section 3: Research Project Methodology

Section 3 will include the role of the researcher, nature of the project, population, sampling, and participants, data collection activities, interview questions, data organization and analysis techniques, reliability and validity of the study, and a transitions subsection. The research included semistructured Zoom interviews as the primary method to collect data from participants. I reviewed organizational documents and data. I analyzed the data collected, the literature review, and participant responses. The interviews of six social enterprise managers may reflect effective strategies to conduct social business.

Project Ethics

As the researcher, I served as the principal data collection instrument. Yin (2018) stated that in qualitative research, the researcher is part of the data collection process. The researcher serves an intricate role in collecting data during a study (Saunders et al., 2019). Shufutinsky (2020) also stated that the researcher in qualitative research needs to emphasize the importance of transparency, rigor, trustworthiness, and credibility in research design, data collection, and analysis.

I have been exposed to business sustainability and corporate social responsibility for 18 years across the United States. In Years 4 through 14, I led businesses that were for-profit and non-profit, during which I conducted interviews and reviewed product and services to market segments. I also defined and shaped corporate policy. I ensured that I

did not have any personal or professional relationship with the participants in this study

by excluding any employees or businesses I have dealt with personally.

Researchers must be aware of their personal values, experiences, and cultural and

environmental conditions when conducting interviews, observation, and research analysis

(Hillbrink & Jucks, 2019). Researchers should strive to achieve a higher level of accuracy

and consensus through understanding personal bias and in ensuring an interactive process

between the researcher and participants through member checking (Abdel Latif, 2019).

Through awareness of personal bias, I mitigated against any misrepresentation or

skewing of results during data collection or assessment activities. To avoid bias,

researchers must enhance accuracy and replicability of research methods and results and

minimize their personal bias in instances where they have direct contact with participants

(Singh et al., 2022). I included the reduction of unnecessary personal influence by

ensuring I did not make any inferences during the interviews, which may increase the

accuracy of the study. Without personal awareness, the researcher may inadvertently

inject bias into the study results (Singh et al., 2022).

I used an interview protocol as my guide to ensure I follow the same procedures

with each participant and use the same interview questions with each participant. Yin

(2018) identified that researchers use interview protocols to gather viable data and

maintain focus on the research problem. While adhering to a protocol, the researcher can

enhance the reliability and increase the quality of the data obtained through research

interviews and the use of member checking to ensure the participant understood the

question I asked and I clearly understood their answers (see Saunders et al., 2019). An interview protocol included a script of what I would say before and after the interview, asked the interview questions related to the research question, and prompted to collect the informed consent (see Saunders et al., 2019).

Researcher's Role Related to Ethics and Belmont Report

I reviewed and adhered to all Walden University research guidance and ethical practices. I also adhered to the Belmont Report (National Commission for the Protection of Human Subjects of Biomedical and Behavioral Research, 1979) protocol and completed the Protecting Human Research Participants training by the National Institute of Health Office of Extramural Research (Certification Number: 5747032. Grey et al. (2019) stated that researchers who follow the Belmont Report establish a framework for legal and ethical protection for participants. Any research containing human participants poses ethical issues and challenges unique to the study of human beings and should include safeguards (Hillbrink & Jucks, 2019). These authors stated that the primary responsibility of a researcher is to protect the confidentiality of participants and participant organization. A researcher must adhere to strict ethical standards as a foundation for achieving moral and significant qualitative research (Singh et al., 2022).

I complied with the Walden University Institutional Review Board (IRB). I also adhered to the Belmont Report protocols by (a) recognizing the personal dignity and autonomy of participants and that there exists special protection for those persons with diminished autonomy, (b) knowing I had an obligation to protect persons from harm by

maximizing anticipated benefits and minimizing potential risks of harm, and (c)

distributing the burdens of research fairly (see Belmont Report, 1974). Hillbrink and

Jucks (2019) asserted that the use of the Belmont Report protocols can assist in meeting

and maintaining ethical standards.

Marshall and Rossman (2017) identified that ethical research includes

demonstrating trustworthiness while maintaining the integrity of standards for quality

research. They also explained that principles grounded in an ethical manner offer

credibility during the research process and help protect participants during data

collection. Saunders et al. (2019) asserted that ethical codes in research include voluntary

consent, favorable risk-to-benefit analysis, and the right to withdraw without

repercussions. Applicable areas of ethical research included in this study were the

consent process and incentives, researcher-participant relationship, confidentiality,

participation guidelines, and data software use and storage.

Consent Process, Use of Incentives, and Participant Withdrawal

Obtaining informed consent is a cornerstone of ethical research (Yin, 2018).

Informed consent is the central doctrine of a research study based on autonomy and self-

determination (Marshall & Rossman, 2017). These authors stated that for informed

consent to be genuine and effective, the form should be simple and in regional language

catering to the cultural, psychological, and social requisites of the participants. The

ability to gain access to participants with the desired characteristics is important to

improve external validity of the study (Saunders et al., 2019).

Therefore, I identified potential social enterprise managers through the Social Enterprise Alliance professional association. I emailed social enterprise managers identified during the digital search via LinkedIn® messenger or direct email and ask them to participate and to contact me directly via email if interested. I used a purposive strategy to identify participants. As the primary and only researcher, I worked independently while screening participants and determining eligibility.

Participants who met the criteria for the research study received an invitation to participate in the study with instructions to contact me directly via email. Enhanced consent forms and extended discussions were effective in improving participant understanding (Marshall & Rossman, 2017). Elements of informed consent included the purpose of the study, any significant risks to the participant, details of financial aspects of the study, and was given freely (Marshall & Rossman, 2017). Obtaining consent consisted of conveying participant's rights as human subjects, the research question under study, the methodology, and the potential harms and benefits (Marshall & Rossman, 2017). The consent form detailed the facts that participation was voluntary, confidential, there were no incentives, and outlined the participant's choice in withdrawing at any time. The participants were provided an informed consent letter and were instructed to return it by email. I will continue to maintain a copy of all signed consent forms and provided a copy for the participant's records.

For consent to be valid, the process of giving information is not enough, rather the element of understanding is the basis of validation (Marshall & Rossman, 2017). Once I

received informed consent, the participant and I determined a mutually acceptable date and time for the face-to-face interview. I delivered, via email, a letter of introduction to all study participants. During this delivery, I ensured there was adequate time and an open dialog to address any participant questions. In my study, I followed ethical guidelines in alignment with Walden University policy. I followed the Belmont Report protocol to maintain ethical standards. Although the purpose of the study was included in the introduction letter, I addressed the reason verbally as an added measure to ensure participant comprehension. These forms collectively outlined participant involvement, the methods of data collection, that participation was voluntary and confidential, as well as the participant's ability to withdraw on their own volition at any time.

The withdrawal process was included in the consent letter. A participant was able to withdraw at any time verbally or in writing. No participants requested to withdraw from the study. Incentives were not a part of this study. The aim of the study was face-to-face, semistructured interviews. At the conclusion of the study, I provided each participant with a copy of the final research product upon request.

Confidentiality and Ethical Protection

I was the only researcher and had sole access to all stored physical data in a locked safe and all soft copy data in a password protected laptop with backup. Data that link participant information such as names, geographic orientation, orientations to participants directly creates potential confidentiality risks (Marshall & Rossman, 2017). The aim of the researcher is to reliably link outcomes for new research objectives without

breach of participant confidentiality (Marshall & Rossman, 2017). Each participant was assigned a coded alphanumeric indicator (e.g., P1, P2), which was used to protect confidentiality and provide further anonymity for participants within the study during all transcription and journal entries. I maintained a log during my data collection. All tracking of dates, times, coded participant identification sets, and signed forms were maintained in an Excel spreadsheet. The participants' collected data will be destroyed and erased as applicable at the conclusion of 5 years' time elapsed from the completion of the study. The data destruction timeline began as dated by CAO approval receipt.

I explained to each participant that (a) the identity of all participants and organizations was to be kept confidential and the research would not disclose individual names, business names, or specific locations; (b) all information was to be stored using a password-protected laptop, on an external hard drive, under lock and key, in a fireproof safe, and only accessible by me for 5 years; (c) data categorization shall also protect participant identity, will not be duplicated or misused, nor made public at any time; and (d) permanent data destruction will occur after 5 years. Each interview was transcribed into Zoom .vtt files and uploaded into ATLAS.ti software. ATLAS.ti is a software tool that aided in qualitative data analysis. The use of a credible software program has been found to improve data analysis, coding outcomes, and save time in the management of the collected data (Yin, 2018). Once themes and patterns emerged, data triangulation included interviews, memos, field notes, and archive or site documents review continued until data saturation was evident (Marshall & Rossman, 2017). These authors proclaimed

storage methods should ensure the physical safety of data while maintaining the participants confidentiality. All data storage methods used a locked, fire, and waterproof safe for 5 years to protect participant confidentiality, after which all data will be extinguished in a manner subsequent with no replication being achievable. The Walden IRB approval number is 01-08-24-0414449 and was approved on January 8, 2024.

Nature of the Project

Research Method

The Nature of the Project component served two purposes: (a) describing and justifying the methodology (i.e., qualitative) and (b) describing and justifying the design (i.e., pragmatic inquiry). The methodology chosen for this research was qualitative. Saunders et al. (2019) classified the qualitative method as appropriate when concepts or categories within a study are unknown and the nature of the study is exploratory. Transferable context and research that may be applied in varying methods is a condition of qualitative research and may help researchers (Marshall & Rossman, 2017). Yin (2018) identified that qualitative researchers use flexible techniques and interpretive approaches that allow new themes to emerge from collected data. The skills of managers in social business are very personal, culminating from their history and experiences, and may be best observed in the managers' day-to-day application of strategies in the business environment. Researchers have used qualitative studies to encompass practical, inductive, and adaptive approaches to complex issues while interacting with participants in their natural environment to describe a phenomenon (Marshall & Rossman, 2017; Yin,

2018). Marshall and Rossman (2017) established that a qualitative researcher can begin

or advance a topic by beginning to outline or define a problem with surprising detail and

can go beyond definition to study participant intentions and preceding actions with rich

data and thick descriptions.

Because I did not test a hypothesis, the quantitative approach was not appropriate

for this study. Mixed method researchers conduct a separate analysis of qualitative and

quantitative data before comparing the results, or sequentially using one data set to drive

the research focus of the second (Saunders et al., 2019). The use of mixed methods is

appropriate in cases where the quantification of data is necessary to explore or examine

data beyond the limitations of the primary research method (Yin, 2018). A mixed

methods approach was not suitable to achieve the purpose of this study. Quantitative and

mixed methods were not chosen for this study because they both rely upon numerical

data and are typically chosen to analyze relationships, strengths of relationships, patterns

of behavior, and other behavioral phenomenon that can be numerically examined.

Research Design

The design chosen for this research was a pragmatic inquiry study. An article by

Kelly and Cordeiro (2020) explicated pragmatism as a relevant and useful paradigm for

qualitative research on organizational processes. The authors focused on three core

methodological principles that underlie a pragmatic approach to inquiry: (a) an emphasis

on actionable knowledge; (b) recognition of the interconnectedness between experience,

knowing, and acting; and (c) inquiry as an experiential process. The authors' doctoral

projects on nongovernment organizations have been used as examples to examine how

the application of these principles strengthen each stage of the research process from

project design and data collection to data analysis, conclusions, and dissemination. This

investigation suggested that pragmatism, which provides a guiding epistemological

framework anchored in the inquiry process and research practicality, is a worthy

paradigm for researching organizational processes. Pragmatism's focus on the production

of actionable knowledge is of particular benefit to research with nongovernment

organizations, ensuring that research is contextually relevant as well as informed by

theory. Using a pragmatic approach, researchers working in organizational settings can

move beyond objectivist conceptualizations, which have dominated research in the

organizational sciences, to exploring and understanding the connections between

knowledge and action in context. Knowing in this sense, has the potential to transform

practice (Biesta, 2010).

Out of the four primary qualitative designs, I chose a pragmatic inquiry design.

Through a case study, researchers explore a complex social phenomenon to understand

holistic real-world perspectives through multiple avenues of dataset collection, allowing

for common theme identification (Ji & Sun, 2022). The case study design is appropriate

when the focus of this study is to identify best practices using multiple data to identify

common themes in a single site with a site agreement that has been approved by the

organization or company the participant works for. Researchers use phenomenology to

explore the lived experiences of the participants (Meyer, 2022). I did not explore the

lived experiences of the participants; thus, a phenomenological approach was not applicable. The ethnographic design is used to research a cultural setting to interpret the behaviors observed within predictable, daily patterns of human thought and behavior (Meyer, 2022). Ethnography was not appropriate for this study because I sought to provide strategies that may apply to varying cultural environments and not observing behaviors. A case study design was not appropriate for this study because site agreements would be required when many or all my participants may be retired or no longer working for an organization. Only informed consent was required for my participants to participate in my study based on the experience and knowledge of information needed to address my research question.

Population, Sampling, and Participants

The population for this study was all social enterprise managers who associate themselves with conducting social business through the Social Enterprise Alliance professional Association. The participants were six managers of social enterprises who had managed a social business for at least 3 years within the Midwestern United States. Selecting these participants allowed me to address the specific business problem for this proposed study, which is that some managers of social enterprise organizations lack strategies to successfully conduct social business inside a private market to improve business operations and profitability. The use of a pragmatic inquiry study also allowed me to address the purpose of this study to explore strategies used by social enterprise

managers to conduct business in the private sector with a social mission, while simultaneously achieving commercial viability (Kruse, 2020).

I used purposeful nonprobability sampling as the method to select a small sample size of six participants who were eligible based on their knowledge and experience managing a social enterprise for at least three years to help me address my research question. My access and data source for this research project was social enterprise managers who associate themselves with conducting social business through the Social Enterprise Alliance professional association, which is an online data base of social enterprise professionals who have conducted a social mission in a private market. The adequacy of collected data was dependent on sound purposeful sampling and achieving data saturation (Yin, 2018). Data saturation takes place in a qualitative study when no new information is forthcoming from the participants during the interview process. Data saturation occurs when researchers use member checking to align confusing answers by asking participants the right questions and confirming agreement on similar strategies among participants.

Following approval of my study by the Walden IRB, I identified individuals that were classified as social enterprise managers associated with conducting social business through the Social Enterprise Alliance professional Association. An invitation was sent to experienced individuals identified during the digital search via LinkedIn® messenger or direct email and included the informed consent letter. The intent of the research was to identify individuals with experience managing social enterprises for at least three years.

The potential participants identified received a direct email with an introduction letter to gauge if the participant was interested in participation. When a potential participant did not respond within two business days, I sent a follow-up email. If there was no response after two emails, I called the potential participant directly. After two consecutive nonresponses to voicemails, I removed the potential participant from consideration within 2 business days of the last message.

Data Collection Activities

Saunders et al. (2019) suggested that a researcher needs to use an exploratory design to develop an overall exploration of data. The primary data collection instrument was the researcher of the study. Therefore, in my research, I was the data collection instrument. Collins and Cooper (2014) emphasized the importance of emotional maturity and interpersonal skills. As a result, the researcher must correctly hear their story and describe the phenomena. Collins and Cooper defined emotional reflexivity as the process of critical self-awareness, self-regulation, empathy, motivation, and social skills that allow regulating one's own feelings and recognizing feelings of others. In brief, the researcher's competence and social competence were two dominant prerequisites for successful research. Personal competence comprised self-awareness, self-regulation, and motivation, while social competence included the ability to respond to others and control relationships.

My research study was conducted in a systematic manner and consisted of semistructured interviews with an approximate length of 45 minutes and archival

document collection. Zoom was used along with member checking post interview. I used an alphanumeric indication for each participant while taking notes within my research journal to protect participant identities.

For all qualified participants who met my eligibility criteria I used the following interview techniques. I used Zoom conferencing to conduct all virtual interviews to facilitate and ease access to participants. The interviews were recorded on Zoom with prior permission from participants outside of normal business hours. I issued an invitation letter to the participants. I assured them that any information obtained during the interview process would be treated in a strict, confidential manner and would be destroyed upon a 5-year completion of the research. I expected participants to expressly demonstrate their consent and acceptance to participate by indicating their willingness and agreement to the research process through their written or verbal consent to the research process requirements and interview questions. Establishing a working relationship with participants helped me to draw insight in the form of rich data and thick descriptions while conducting the study (Kaewkungwal & Adams, 2019). The knowledge gained from the participants using qualitative methods to draw insight allowed me to establish relationships and patterns that were essential in identifying themes for my study (Geier et al., 2021). The relationship I had in connecting with the same underserved populations the managers serve opened a dialog with the managers. The connection and understanding I had provided a deeper understanding and increased the opportunity for rich discussion. Participants were more open and provided contextual data while offering

more data than a quantitative method would allow (Kane et al., 2019). The consent form included information regarding the study and was designed to assist the participant in making an informed decision surrounding participation and helped foster a working relationship by establishing transparency and trust early. Successful recruitment of participants required attention to a longstanding lack of trust and negative beliefs surrounding research about underserved populations (Suriyankietkaew et al., 2022). In small groups and personal interviews, participants felt less inhibited, which also provided detail driven opportunities for the qualitative researcher to explore this phenomenon in the proper depth to address my research question (Geier et al., 2021).

Research design, relationships with participants, and understandings of contextual dimensions of populations were important factors in conducting the research (see Saunders et al., 2019). Sharing a commonality with some of the participant's business markets allowed more open and honest interviews and follow-up sessions (Kane et al., 2019). Yin (2018) indicated that a common working relationship needed to be established between the participant and researcher to provide an enhanced data collection opportunity. A reciprocal relationship between researcher and participant was needed to achieve mutual benefits of the research and a more collaborative approach to research design and execution (Singh et al., 2022). I grew up in the marketplace of many social businesses and experienced the general lack of opportunity to the market capitalization of social business ventures. However, the researcher must maintain the appropriate

professional relationship while establishing a connection with the participants (Yin, 2018).

There exists a relationship between the purpose of the study, the research question, and the problem statement (Saunders et al., 2019). Study parameters were set to select participants who were knowledgeable and directly involved with the topic of research (Marshall & Rossman, 2017). Since the specific problem statement was that some small business managers lack strategies to conduct social businesses, I ensured that only those participants with at least three years of social business experience were included in my interviews.

Data Collection Instruments

In addition to oral data collection, archival documents were collected and consisted of documented policies, procedures, or guidelines as they pertained to social business strategies, processes, or best practices. Methodological triangulation enhances both validity and reliability (Marshall & Rossman, 2017). These authors stated that triangulation was based on multiple data collection techniques were adequate to solve the rival of causal factors and revealed different aspects of empirical reality. The confirmation of all findings assisted in demonstrating validity and reliability of the data collected (Yin, 2018).

Each participant had the opportunity to correct errors in the interpretation, adding credibility to the interview process (Saunders et al., 2019). Member checking was the process of involving participants to review data and help the researcher identify potential

researcher bias, explore additional angles, and helped to maintain a full perspective surrounding the phenomenon (Saunders et al., 2019). Member checking was a part of the quality control process designed to ensure participants could help to review transcript accuracy (Marshall & Rossman, 2017). Member checking involved allowing participants to read their interview transcripts to ensure they were accurately recorded, which ensured credibility had been enhanced and achieved.

Data Collection Techniques

Data collection was the gathering of information from individuals on a one-on-one basis (Yin, 2018). Through interviews, participants drew on memories experienced in different environments and cultures within the small business. Semistructured interviews allowed the researcher to measure participant experiences and personal perceptions of the research subject (Yin, 2018). Typically, data was collected through such mediums as interviews, observations, and documents (Marshall & Rossman, 2017). The proposed qualitative exploratory pragmatic inquiry data collection consisted of semistructured interviews combined with archival document collection. Data collection began after IRB approval from Walden University. The interviews were carried out using open-ended questions. The focus of this study was to identify strategies that may be needed and required to conduct business as a social enterprise.

Semistructured Interviews

Yin (2018) stated that the strength of qualitative research was the ability to explore attributes of a topic under study utilizing how and why questioning. I conducted a

pragmatic study using semistructured interviews surrounding the social enterprise and demonstrate triangulation of data. Researchers who conduct interviews provide rich and qualitative data for understanding participant experiences and the meaning they make of those experiences (Marshall & Rossman, 2017). My research guided the semistructured question development and I developed a script for the beginning and end of my sessions. Researchers using semistructured interviews including open-ended questions allowed for follow-up, clarification, and deep dives to elicit meaningful rich data with significant explanatory responses (Marshall & Rossman, 2017). Asking the same questions to each participant in an interview minimized the variation in the responses (Yin, 2018). The interview protocol began with introductions, an overview of the topic, explained that the interview will be recorded, and were to be kept confidential. The interviews included open-ended questions and follow-up questions based on the participant responses. I structured the interview questions to begin basic easier questions and moved towards ones that were more difficult or controversial. I ensured the follow-up interview questions aligned with the designed research questions and constructed an inquiry-based conversation during the interview. Using semistructured interview methods can enable researchers to explore specifics arising from participants who display unplanned and instinctive responses to questions (Marshall & Rossman, 2017). During the interview process, I expected innate and instinctive responses from participants. During each interviews, I recorded the participant's identifying code, date, and the time of the interview in the journal.

Member checking allowed the participants to address any potential discrepancy in the transcription (Marshall & Rossman, 2017). I personally checked for errors before providing the participant with the member checking opportunity. A copy of the transcripts was provided to the participant for review before loading the transcript into ATLAS.ti for data analysis.

There were some potential disadvantages to semistructured interviews. The researcher must be cognizant as not to project any personal ideas, beliefs, opinions, or perspectives to participants while fostering an environment for the participant to speak openly, freely, and without fear of reprisal (Yin, 2018). The fostering of the interview environment required me to have skills such as careful listening, the ability to read the non-verbal communication, and detailed observations.

Archival Document Review

Triangulation of data was enhanced with the collection of secondary data (Yin, 2018) and consistency across sources shed additional light on complex business strategies (Marshall & Rossman, 2017). The purpose of the qualitative exploratory pragmatic inquiry study was to explore the best practice skills of managers to sustain social business beyond 5 years. The use of secondary documents provided additional insights into how managers applied those skills. I asked for participants to make documents available to me that were tactical and strategic process documentation, policies, procedures, guidelines, and marketing plans since documentation can come from multiple sources (Marshall & Rossman, 2017) and monitoring data for consistency may improve accuracy (Yin, 2018).

There were some disadvantages and limitations to secondary data reviews. Different researchers may identify or interpret results differently. I collected only documentation that pertained to the identification of best practice skills in conducting the social business strategies to assist in identifying or answering the research question (Saunders et al., 2019).

Interview Questions

The participants were asked the following open-ended questions during the semistructured interview process:

1. What skills do you use to conduct business as a social enterprise to improve business operations and profitability?

2. What financial strategies do you use to improve business operations and profitability?

3. What operational strategies do you use to improve business operations and profitability?

4. What personnel strategies do you use to improve business operations and profitability?

5. What social business processes have you used within the organization to improve business operations and profitability?

6. Is there anything else you add that would help me to understand the uniqueness of your approach that adds value to your strategies?

Data Organization and Analysis Techniques

Qualitative data created unique issues since the information collected was synthesized and algorithmic programming applied to analyze narrative data (Yin, 2018). I maintained an Excel spreadsheet to track and corroborate all participants, interviews, transcriptions, consent forms, and communications between the participants and myself. An important step was the analysis of qualitative data, which helped guard against false expectations and allowed the data to confirm facts about the study (Saunders et al., 2019). I filed the data electronically for ease of retrieval and was only accessible to me personally. Data collections are the building blocks for a pragmatic inquiry study. A researcher must use techniques and tools to make sense of the data collection before proceeding to reviewing commonalities and differences in the study (Marshall & Rossman, 2017). The password protected laptop with encrypted external hard drive was be stored in a fire-proof safe in my home office and will be for at least 5 years.

There are computer-assisted qualitative data analysis software (CAQDAS) assisting tools to code and organize the themes. Miles et al. (2019) confirmed that for more extensive or multiple-case studies, CAQDAS was a necessity. However, much manual work is still required to prepare data for CAQDAS. Miles et al. (2019) warned that no software is an all-purpose package. As all software comes with their own strengths and weaknesses. Therefore, I listed all data categories and created a visualization of the themes and strategies and their relationships with the outcomes achieved in addressing my research question (Gossett et al., 2019). The visualization was

used for critical analysis to depict the dynamics as to how this complex system worked as a negative feedback system. However, I used ATLAS.ti software to evaluate relationships between codes, themes, and their strategies. Moreover, ATLAS.ti assisted me in compiling, disassembling, and reassembling data in the most efficient way (Yin, 2018). In conclusion, high-quality data analysis best-addressing research questions contributed to the practical data organization and resulted in the reliability and validity of the findings. I reviewed and addressed any new studies that were not available during the proposal research in Section 4.

Reliability and Validity

Reliability

Quality within qualitative research has components of reliability, validity, and other concepts like consistency and adequacy of meaning (Yin, 2018). The trustworthiness of qualitative content analysis was presented by using terms such as credibility, dependability, conformability, transferability, and authenticity (Marshall & Rossman, 2017). Qualitative researchers who are not careful to follow a good research framework while conducting research can struggle with objectivity, reliability, and validity (Marshall & Rossman, 2017). Within qualitative research, transferability relates to reliability while validity is representative of trustworthiness and credibility (Marshall & Rossman, 2017). There are many differing points of view on the need for validity and validation is crucial to the creation of knowledge (Yin, 2018). In qualitative research, reliability is the achievement of the researcher to provide dependable and transferable

context to other studies (Marshall & Rossman, 2017). Saunders et al. (2019) explained

four factors affecting data reliability that I considered during my research process. First,

participant error refers to the quality of participants' responses during the interview. For

example, insufficient time or an uncomfortable place for the interview may cause the

participant to rush with answers, thus jeopardizing data quality. Virtual attendance from

their home or office resulted in a participant feeling comfortable and safe. Second, if the

participant feels a lack of data anonymity or loss of trust, he/she may become biased by

purposefully providing an incorrect response. To address this issue, I clearly explained

my ethical responsibilities as a researcher. The third threat affecting data reliability is

researcher error and is often caused by researcher tiresome, lack of focus, or wrong data

interpretation (Saunders et al., 2019). Therefore, I ensured I was well rested and fresh

before the interviews to focus on dialogue with the participants and did not conduct more

than three interviews in one day. Last, researcher bias or subjective view may influence

participants' responses or data interpretation. For illustration, as a researcher, made sure

that I did not influence responses with my nonverbal communication, suggestive

questions, or tone during the interviews. Similarly, I needed to build trust and rapport

with all of the participants. Otherwise, it risked data reliability. To enhance reliability in

my study, I ensured data saturation was achieved and implemented strategies such as

methodological triangulation and member checking throughout the study.

Validity

Data source and triangulation strengthen the validity of a qualitative study (Yin, 2018). A common way to discuss validity in qualitative research is through the concepts of content and construct validity, which ensure trustworthiness and credibility (Marshall & Rossman, 2017). Within qualitative research, there are three components to validity; design, analytical validity, and inferential validity (Miles et al., 2019). Design validity portrays the accuracy of events, objects, behaviors, and settings that are reported, the results from the participants are believable, and can be generalized to be transferred to other settings. Analytical validity provides theoretical validity that fits the data, describes changes in the research setting and its effects on the research approach, verifies the steps of the qualitative research process, and ends with the findings of the study fitting the data from which the findings are derived. Whereas inferential validity assumes interpretations of accurate participant views while the results can be confirmed by others.

Content validity, as intended, is the understanding of a measure and whether it captures the relevant aspects of a concept (Yin, 2018). In this research study, content validity concerns whether I captured the most important and relevant strategies of managers in social business practices. I realized I needed to measure a non-tangible concept during this research. Therefore, it was amenable to assess not only the opinions of the study participants but the conceptualization of the strategies I assessed. Understanding the participant's conceptualization of the best practice skills of managers in social businesses provided for a more valid and full understanding of the concept

(Miles et al., 2019). Construct validity is the degree to which an instrument measures the construct it is intended to measure (Yin, 2018). The researcher adds legitimacy of the concepts through connection of the research theory and measurements to ensure relationships exist between the data analysis and the purpose of the study (Marshall & Rossman, 2017).

In my pragmatic inquiry research study, validation was achieved through triangulation, negative case analysis, prolonged engagement, and clarification of researcher bias through reflection (Marshall & Rossman, 2017). Validation in qualitative research could be enhanced using secondary data and member checking (Miles et al., 2019). To achieve generalizable and repetitive findings, the data saturation points were sought after to allow the greatest opportunity of repetition and relevance. Using a pragmatic inquiry design, researchers can generalize from a smaller number of cases to larger population of cases (Yin, 2018). Yin posited that case study generalization takes the form of an analytical or conceptual generalization, rather than of reaching for a numeric one. I demonstrated triangulation from the document reviews and open-ended semistructured interviews to ensure the data collection was comprehensive and addressed my research question.

To ensure my study was dependable for the scientific body, I provided detailed steps I took throughout the study, provided detailed audio recordings and recording transcripts. To ensure quality control, I conducted transcript review to ensure accuracy of the transcripts and member checking by interacting with participants to ensure their

understanding of the questions and my understanding of their responses. Secondary documentation was also collected to support participants' responses to questions. I provided a summary of the study to each participant, which allowed me one additional opportunity to check the meaning of the results, which also enhanced reliability and validity.

Transferability

With transferability, the reader determines if the methods used or the findings from one setting can be applied to another context (Yin, 2018). In this study, I provided detailed information on the steps I followed to ensure another researcher can replicate the methods that I used. Sometimes it is difficult to confirm if small samples can assure generalizability which explains why external validity does not apply to a qualitative study (Marshall & Rossman, 2017). Therefore, qualitative research instead uses the term transferability allowing the reader to decide if the same steps can be used and are applicable from one setting and can be transferred to another. Saunders et al., (2019) indicated that researchers must provide detailed descriptions to allow the researcher to make this type of determination. Transferability provides detailed information to the reader enabling analysis and decision making to decide similarity between in qualitative research. For example, my research study explored strategies that managers of social businesses used to achieve efficiency and effectiveness in non-profit and for-profit organizations.

Confirmability

Saunders et al. (2019) elaborated on strategies ensuring the trustworthiness of the research. They included prolonged engagement and persistent observation, triangulation, peer debriefing, member checking, audit trail, reflexivity, and thick descriptions. Additionally, Saunders et al. (2019) suggested participant or member validation as another tactic to enhance credibility. These authors also explained the importance of cultural reflexivity when exploring multicultural organizations as a powerful strategy to minimize bias. Similarly, Yin (2018) suggested using a case study protocol, study database, and maintenance of chain of evidence as critical for reliability. I would instead agree with Miles et al. (2019), who argued that the trustworthiness of the phenomenon could be confirmed through evidence convergence by collecting perspectives from different sources using multiple strategies.

Credibility

Internal validity or credibility assures data saturation has been achieved resulting in accurate, complete, consistent, and rich data achieved through member checking and triangulation (Saunders et al., 2019). Credible research can be achieved through prolonged engagement and persistent observation (Miles et al., 2019). Such an approach requires researchers to spend extended time in the field with participants. I used triangulation and member checking to achieve data saturation using more than one source of evidence, thus ensuring credibility. Marshall and Rossman (2017) explained four types of triangulations: data, investigator, theory, and methodology triangulation. I conducted

data and methodology triangulation in my study. Furthermore, I applied member-checking as an effective way to achieve credibility in my study.

Data Saturation

Credibility, transferability, and confirmability are all elements of quality qualitative research (Yin, 2018). Data saturation is met when the researcher finds no new information or themes (Marshall & Rossman, 2017). When the researcher has completed data saturation, and the results are credible, transferable, and confirmable: they meet the criteria for a valid research study (Yin, 2018). While analyzing data, I identified themes to ensure that no new information emerged, thus reaching the point of saturation. I achieved data saturation because no further emerging information emerged to address the phenomenon. I used methodological triangulation through in-depth semistructured interviews and document analysis to achieve data saturation.

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Transition and Summary

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In Section 3, I defined the role of the researcher and then continued with justifying the selection criteria and eligibility of the participants. Next, I provided reasoning for the research method and design I selected and explained the population selection process and sampling method. This section further contained ethical research, data collection instruments, techniques, and data analysis. Last, I ended Section 2 detailing methods to reach reliability, validity, and data saturation.

In Section 4 of the study, I will cover the presentation of the findings and conclusions of my study. In addition, I will also cover (a) the study's application to

business practices, (b) the study's implication on social change, and (c) recommendations for strategy implementation within the social enterprise to sustain, expand, or modify their business practices. I conclude the study by making suggestions on additional research that needs to be conducted in this field of study.

Section 4: Findings and Conclusions

Presentation of the Findings

Some managers of social enterprise organizations lack strategies to improve business operations and profitability in a social business inside a private market. The purpose of this qualitative pragmatic inquiry study was to explore strategies used by social enterprise managers to conduct business in the private sector with a social mission while simultaneously improving commercial viability. The research question was as follows: What strategies are used by social enterprise managers to improve business operations and profitability? The study was comprised of six social enterprise business managers who have successfully implemented strategies to manage a sustainable social enterprise in a private market sector. The data collection process included semistructured interviews consisting of open-ended questions with six managers in the midwestern region of the United States. Each interview did not last more than 1 hour, which allowed the opportunity for questions to be answered, to expand on those questions, and for the participants to add anything they felt was beneficial to the study. To enhance the study's credibility and dependability, I employed member checking and triangulation techniques.

Using member checking and triangulation, I reinforced the studies reliability and validity. Candela (2019) suggested that by employe triangulation, it is possible to cross-verify conclusions using various data sources for validation. I verified that all six participants had implemented strategies to ensure a sustainable social enterprise. Aside from conducting semistructured interviews, I employed methodological triangulation in

my research study by comparing transcripts, interview responses, social media data, and company documents to ensure validity of the findings. Figure 1 shows a bar graph of the data saturation in this study.

Figure 1

Data Saturation Bar Graph
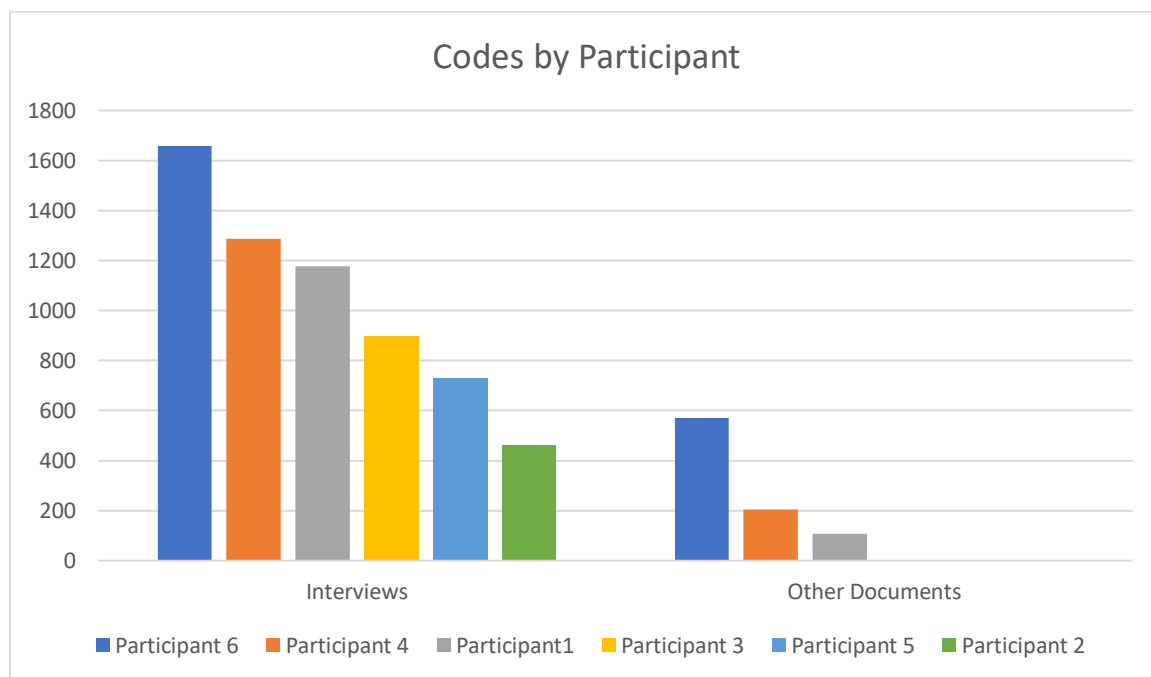
To protect the identities of the participants, I replaced the names of the social enterprise business managers with Participant 1 (P1), Participant 2 (P2), Participant 3 (P3), Participant 4 (P4), Participant 5 (P5), and Participant 6 (P6). Following a comprehensive coding of the collected data and the identification of thematic elements, a subsequent step involved the execution of member checking. This process entailed the dissemination of a condensed transcription to each participant, followed by

individualized sessions with each of the six participants for a meticulous member

checking procedure. The primary objective of these sessions was to ascertain the fidelity

of representation concerning our dialogues and their responses to the posed inquiries. The

purpose of this iterative member checking process was twofold: to safeguard against

omissions or errors in the participants' articulated statement and to validate the accuracy

of the amassed data through the application of triangulation methodologies. The

following patterns and themes have surfaced from within the data: (a) financial well-

being, (b) sustainability, and (c) community involvement.

Figure 2 shows a graphical representation in the form of a Sankey Diagram. The

Sankey Diagram depicts the key groupings derived from the 3,866 relevant codes

identified using ATLAS.ti to qualitatively analyze the research responses from interviews

and other supporting documents.

Figure 2

Sankey Diagram: Proportions of Commonalities in Key Words
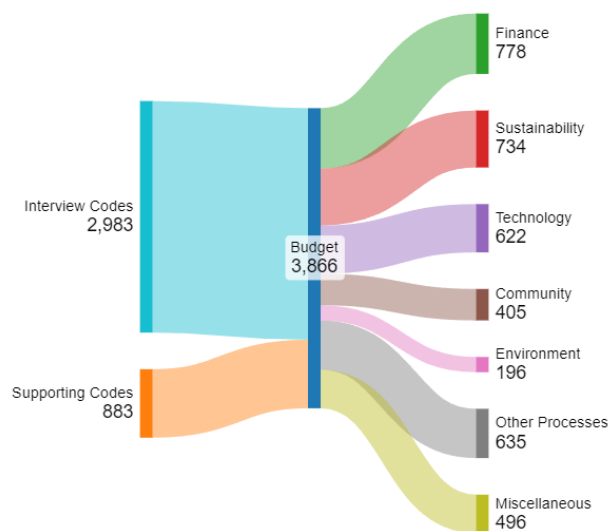
Note. The thickness of the lines in the diagram corresponds proportionally to the identified connections between the analysis and other codes elicited during the interview process. The diagram, crafted by the researcher using Atlas.ti Desktop for PC, serves as a visual representation to convey the research findings derived from the study.

P1, P2, and P3 were private not-for-profit social enterprise managers and served at some point in their careers as local or state community leaders. P4 and P5 were private for-profit social enterprise managers. P6 was a publicly traded for-profit social enterprise manager. All participants served a different economic market.

During coding and thematic resolution of my qualitative research, it became apparent that there are many overlaps and interconnected relationships between themes.

As an example, sustainability and financial themes have a component of cost reduction and efficient resource use and disposition. While technology was the second largest coded theme, the strategies fit into the strategies of the below themes and are covered within those strategies due to their use in direct relation to specific strategies. While environmental was a solid fifth ranking in themes, it fit within the sustainability strategy base and is covered there.

Theme 1: Financial Well-Being

Financial well-being manifested in three primary ways. Frist, managers should identify automation opportunities and challenges because of reduced personnel resources availability regarding skill and numbers. Second, managers also need to identify the technology tools and processes to assist personnel in doing more with less and accomplishing their work faster. Finally, managers may need to replace the CAPEX strategy with an OPEX strategy to lease instead of owning equipment and other physical assets.

Strategy 1: Personnel Cost Reduction Ratios

The use of technology was evident in all six participant responses. The most used technology in personnel cost reduction ratios was to leverage technology to increase staff productiveness or decrease the required number of staff to do the same work. By increasing staff productivity using technology, service technicians reduced their time on site for customers and could handle more customers while providing better service. By leveraging AI, administrative tasks are being automated, and equipment design

documents are being automatically generated, both of which lessen the reliance, or need altogether, for the participants.

Access to self-reporting and self-alarming systems is lessening the downtime for operations and has allowed the same operations to increase production while maintaining or reducing staff numbers. AI was being implemented in three of the six participant businesses as a strategy and warrants deeper research to understand the effects on personnel in a broad range of activities within the social enterprise. Social enterprises managers are changing organizational structures of personnel to align with the sustainability mantra of the companies. P5 explained how they use AI to reduce personnel costs:

> It's kind of complicated how we do it you know. And we know the investment we make in personnel, and we get good people. By leveraging technology tools in meters, product delivery, technician tracking, usage data, and report distribution, we have increased the productivity of the same technician. Combined with route efficiency, they are now able to see more customers and are increasing the service they provide to the customer.

In addition, P6 stated,

> We have completely rearranged how we think about personnel and their alignment to sustainable actions. We have developed an organizational structure and set of actions that streamlines the pre-engineering phases and makes our personnel more efficient. We train the key personnel a lot more than we used to,

so not only are we attracting people, but we are also keeping them because of the

impact they feel. This adds up and all together reduces our cost per hire.

Furthermore, P4 was doing business with little to no direct hire personnel:

Technology, oh, with the ancillary stuff, it's about 3,000 dollars, but it's a fraction

of what a person costs. It's all about using local machinery sitting idle at these

shops and helping the local guy employ more people and gain more revenue

share.

Strategy 2: Operational Cost Reduction

Operational cost reduction strategies were far reaching. Each participant manager

had something they were working on for cost reduction. They have achieved cost

reduction using hiring strategies, training strategies, technology replacement, technology

adoption, delivery and route efficiencies, and leasing versus buying. P2 used cost

reduction strategies:

We have containers on site, storage containers and we remove those containers.

So, you don't keep them on site regularly. So, one of our big challenges and

strategies from both cost and sustainability is, how do we operate that service

efficiently with so many customers on a route? How do we make sure a customer

doesn't run out, and how we optimize that delivery schedule…We invested into

an automated tank level monitoring platform, <that reports back over cellular

network> so we only have to go onsite when we need to deliver product.

P3 used a strategy to not purchase equipment and get the work done:

So, it's just a reinvention of business and the model of industry since we have

digital manufacturing these days. Even in higher labor cost markets we are

tapping into idle machinery at private shops and providing the engineering files

directly to the process automation. Those CNC machines only get used two to

three hours a day. That manufacturer is local to the customer, within two to three

hours. So we are collecting orders digitally, delivering it to a local manufacturer,

and they are using local labor to produce products. Doing so, we are competitive

with the Chinese import warehouse…and we are manufacturing in the U.S. to do

it.

Strategy 3: Financial Strategy

The days of asset strategies like owning physical assets to support and produce a

product may be on its way out. All six members had or were transitioning to an OPEX

strategy over their normal CAPEX strategies. While the operations are not strictly one or

the other, they were choosing to lease versus buy. P6 explained that

In a lease we can write off against our books <taxes> all or almost all of the cost

the entire length of the lease. We do not have to depreciate an asset over some

obtuse number of years. With technology changing so fast, we also get upgraded

equipment sooner than we would normally have been able to purchase in a

CAPEX strategy.

P5 echoed the statement very closely: "We get technology faster, so we don't get left

behind and lose our competitive advantage in our marketplace."

Theme 2: Sustainability

Sustainability is important in social enterprises and is used in strategies to reduce costs, enhance reputation, enhance resource efficiency, and provide a competitive advantage. Sustainability strategies used by social enterprise managers allow for the management of the resource life cycle cradle-to-cradle. Managing the resources in this manner provides the additional benefit of the care and use of the resources within the lifecycle, ensuring availability of resources, a healthy environment, and maintenance of biodiversity.

Strategy 1: Connecting Sustainability Concepts

Social impact should be part of the company's brand, not separate from the brand. How the efforts of the social enterprise align with values, attributes, and strategies informs how managers of social business tell their sustainability story, from narrative to design. The communication surrounding that connection appears to have some correlation to whether the sustainability actions are accepted by the customers. More research is needed to identify what type of correlation. P5 stated,

> To do this we have to keep it simple. Our customer base doesn't seem to understand how sustainability is connected to the business. While we are cognizant of a certain level of transparency, throwing the kitchen sink worth of our sustainability data at our customer base did not go well. The right approach seems to be more filtered to relevance as it pertains to the brand. We are receiving much better results.

P2 embodied the idea in a similar fashion:

> The business has to keep it personal. We do that by using stories that are relatable
> to our customers. My approach is to give them the tools to draw the inference
> between our achievements and why we decided to do what we did. It builds a
> stronger connection with the brand.

Strategy 2: Efficient Use of Resources

Resources are used by a social enterprise in a variety of ways and different
resources are used in different processes. Natural resources, human resources, and capital
resources are the main groups. As in other strategies outlined in this research, resource
management has cost reduction possibilities and other sustainability components.
Efficient use of these resources, such as with the circular economy theory, may have a
crucial role to play in how we source, use, and disposition them. The mindset among the
participants was such that they were going away from a cradle-to-grave strategy to a
cradle-to-cradle strategy. One participant stated they reused 98% of the resources
returned to them in one product line. P6 simplified the use of resources:

> When a particular task has clearly defined process and rules, we generally can
> automate it, which saves employees from these extremely tedious and time-
> consuming tasks. In turn, we can focus our logistics team member's efforts on
> new 'value-add' functions. It also reduces errors related to human input and
> ensures a process gets done the same way, every time it needs to happen. We
> leverage two different software platforms, UI Path and Power Automate, to create

and perform automated process flows within a cloud environment. To date,

automation addresses a "Work Smarter Not Harder" mentality. Logistics and

transportation automated bots help us save time, money, and people resources.

Moreover, P2 stated,

Resource leveraging helps us utilize assets effectively to support new

ventures, new startups, and encompassing all this is performance tracking

each type of use. Key performance indicators in the process, like pounds

input, pounds produced, and pounds waste. But more importantly, we train

and develop those onsite leaders and management personnel to understand

what they were looking into <with those KPIs>.

Strategy 3: Environmental Impact

While the environmental cause and effect had a solid showing as the number five

theme in the research, it falls within sustainability targets and makes the most sense to

cover it as a strategy versus a theme on its own. Environmental sustainability refers to the

responsible management of natural resources to fulfill current needs without

compromising the ability of future generations to meet theirs. P5 made a statement

clearly:

So, you know, how would we do it differently now, looking at the social sphere

versus pure money. Things have been largely tied to the money thing with a lot of

our ownership and management, because that's who the decisions have been with.

We're starting to see with some of the next generation that more people are caring

about the environment and consequences and things like that, or social justice in

terms of how we treat our employees.

P6 said this about the strategy:

You know it's the trained personnel that's doing something. We make

investments in them, and we have good people. We do good things for social

justice; we do good corporate governance. It's good financially for business; and

you know, and the same thing for the environment.

Theme 3: Community Involvement

Community involvement is an integral part of many community members' lives.

The research points to community involvement as the third theme. Three strategies came

to light in relation to Theme 3 were as follows: (a) involvement in local organizations

who have meaningful ties to the community, (b) servant leadership, and (c) filling a need.

Strategy 1: Involvement in Organizations with Local Ties

Social enterprise managers recognize the importance of connecting at the local

level with organizations that have local ties to other social missions. This can make or

break the acceptance of an organization in the local community and impact the ability of

company managers to affect positive social change. Being viewed as competition versus

a community partner is vital for a manager to establish the organization as a social

enterprise. Local organization involvement may create a sense of belonging and build

symbiotic relationships with other social enterprise leaders and organizations. This is

validated by P1 when they stated,

The first step is to find out if there is a United Way organization in that

community and to go in and have a discussion with the executive director to gain

support for this kind of work and to understand how the programs by themselves

address a significant portion or some part of these social needs. It is a very, very

important step in terms of local cooperation. The second step is community

involvement with other organizations like the Chamber of Commerce and similar

clubs such as Rotary.

P3 had a similar strategy and explained it differently: "Building out the local connections

is a definite when pursuing business in the area. You must understand the local vendors

and connections within the existing community you want to serve."

Strategy 2: Servant Leadership

Servant leadership was exposed to be similar but with distinct characteristics

between private not-for-profit and for-profit social enterprises. In private not-for-profit

social enterprises servant leadership manifested as finding people with a call to action.

Those personnel, volunteers and paid alike, had a servant leadership personality putting

the mission as a high priority in their life. In for-profit organizations, servant leadership

manifested in sourcing from local vendors and building the strength of the community

through involvement of local contractors and vendors. P2 made this statement:

"Collaboration of members who were also mentees were found places where a lot of

servant leaders were found." P1 made this point: "I liked talking about the idea of servant

leadership as a call to arms in the services that you're trying to provide back to the

community. I would explain what servant leadership was through stories of real happenings." Finally, P6 supported that "by strengthening the local vendors and contractors, we strengthen the servant tie to the community."

Strategy 3: Filling a Need

The age-old adage "where there's a need" came out in this strategy. Each participant pointed or eluded in some way to there must be a need the social business is fulfilling. If there isn't a perceived need, it would be difficult to establish a call to action, regardless of the number of servant leaders called to action. In support of this P1 stated,

> Where there is a need for something to be done and if you focus on that with the
>
> right help and support, you can get things going and address the "social mission"
>
> then, in a new, interesting, and innovative way. And make a huge difference in the
>
> lives of people that you're trying to help.

Themes/Strategies and Review of the Literature

The potential themes identified in the original literature review included (a) business culture, (b) leadership skills and strategies, (c) social technology, and (d) competing resources. In a comparison to the themes that were discovered during my research, it shows validity in the existing academic literature and the outcomes of this research have added to the existing body of knowledge as overlapping information within the research's thematic base can be perceived as having a congruent outlook as those identified in the literature review independently.

The potential strategies within the review of literature themes included sustainable social impact, funding, social/psychological and innovation capital, strategic and market planning, employee recruitment, and technology. Sustainability excluded, each of the potential strategies related to the research findings in some way, though not in the exact ways prefaced during the literature review.

Technology did emerge as a group of its own and was the second highest ranked group prior to identification of the final themes. However, in the context of each of the other themes the technology component was a strategy used in each to accomplish the goals of that theme as they pertained to the social enterprise at that time, thus technology was deployed within each of the other three themes.

Employee recruitment was established as a strategy in the context of labor costing and of the overall financial theme. Recruitment cost alone did not surface as a stand-alone strategy. Strategic and market planning did surface as a relatable strategy to the social enterprise in a way that exhibited market growth and sustaining a social driven mission in the for-profit private sector and in balancing rising cost against increasing revenues in the not-for-profit private sector to ensure public sector funding was not lost.

Capital in the forms of social, psychological, and innovation was only relevant in the terms of innovation capital and technology. The participants provided deep knowledge of how technology was used in the control of costs and the expansion of the market they performed in. Control of costs was the prevalent use of technology in all

social business types whereas technological innovation for revenue expansion was prevalent in all for-profit social enterprise participants.

Funding was a significant part of discussions in private not-for-profit organizations who exhibited some reliance on government funding. Increased revenues above a threshold caused a loss of funding from the public sector programs. The paradox of managing cost and limiting revenue increase simultaneously was a topic of discussion for each private not-for-profit participant's discussion. Funding in the for-profit private market social enterprise was discussed with sufficient depth in terms of the participant actively in the startup phase of a social enterprise. Discussion was limited to circumstantial detail by for-profit social enterprise managers; rather they discussed funding in terms of revenue generation due to market capture activities.

Sustainable social impact strategy increased in prevalence from the literature review to the study findings. Sustainability rose to the level of a theme in the research findings. The level of sustainability in the participants' answers warrants a closer look at the motivating factors of social enterprises in the for-profit private sector. Inside the private, not-for-profit industry with public funding, research on government funding programs may be warranted as it could be a limiting factor in how much impact a not-for-profit organization may have socioeconomically.

In reviewing information published since the inception of my proposal, the landscape has grown. In a study by Baquero and Monsalve (2024), social entrepreneurship plays a crucial role in global sustainable development. The study

specifically focused on the energy industry. The purpose of the study was to illustrate

new alternative energy schemes. Several causes for the delivery of this research were

noted. Some include (a) political pressure from the energy importers and (b)

environmental concerns related to the energy industry, and dwindling hydrocarbon

supplies – particularly petroleum reserves. The pressures received from multiple sources

verify the application of the CVF framework in each dichotomy was warranted.

Toikko and Rantanen (2024) have recently published stating there is a spectrum

of social enterprises. The first question in determining the business residence on that

spectrum is what the aim is. The second asks what the focus of the enterprise is. Members

of the social enterprise grouping of businesses seek to address systemic problems within

existing social structures by introducing revolutionary change. The researchers found that

during the past 2 decades, the production and delivery of social services has seen a shift

towards the so-called welfare mix model, and the main proportion of social services is

provided by the public sector, but the role of outsourced services has expanded. The

public sector has decreased from 77% to 70% over that time. The researchers went on to

state that "on this basis, the outsourcing of public social services to for-profit and non-

profit organizations can be seen as a main trend in the production of social outcomes

(Toikko & Rantanen, 2024).

The new research is a supportive element that the role of the social enterprise as a

nongovernmental organization will continue to be critical in the circular economy, and

further research will be warranted. The sustainability of these organizations may become a crucial factor in the future of the economy, humanity, and this planet.

Themes/Strategies Relating to the CVF Conceptual Framework

Quinn and Rohrbaugh's CVF was considered the framework for this study. Social enterprise managers have certain strategies to ensure a sustainable social enterprise with competing priorities based on the type of entity structure--for-profit, nonprofit, and not-for-profit--and the mission impact. These strategies include and are not limited to financial, operational, technological, and social impact. During discussions, it was apparent that the managers had competing priorities put on them by executive leadership and government organizations that simultaneously forced them to balance the paradox of competing resources and leadership expectations.

I found three unique differences between the literature review findings and my current research study findings. The continuum of business types and orientations, the lack of information from participants regarding individual leadership styles, and the focus on sustainable strategies used by social enterprises. An apparent continuum of business types that are grouped as social enterprises exists. On one end of the spectrum are non-profits that receive funding from government and public sources, and on the other end of the spectrum are for-profits that derive funding from market share in a private market segment.

The viewpoint of the CVF framework did not present the opportunity for participants to establish the importance and relevance of individual leadership styles on

the social enterprise mission. With the right leadership at the right time, these types of organizations could succeed more often. To identify managers' leadership styles in social enterprises, a different conceptual framework would need to be applied to this research. Research is coming out that questions the age-old key performance indicators (KPI). Stewart (2023) prodded social enterprise leadership to update KPI thinking. He postulated the need to adopt a more human-centric approach considering underlying factors. The organization's long-term sustainability should be paramount when developing KPIs over the existing short-term economic indicators used today. The indicators he proposed are KPIs indicating whether social enterprise staff are informed, involved, interested, and inspired by the leadership style and mission.

While touched on in the literature review, sustainability was more prevalent in the research outcomes than previously identified. The paradox of resource competition in non-profits differed from that in for-profit due to the organizational form and orientation. Sustainability was a prevalent factor in strategies the social enterprise managers employed, applied in different forms at different times of the business cycle.

Figure 3 illustrates the frequency of words participants mentioned during the interview. The words time, business, logistics, and automation appear larger than most words as examples of the most frequently communicated.

Figure 3

Consolidated Frequency of Words Communicated by Participants

Note. The size of the words indicates the frequency of the words mentioned during the interview. The different colors portray the words with differentiated purposes.

Business Contributions and Recommendations for Professional Practice

The social enterprise strategies identified in this study can help social enterprise managers enhance their ability to ensure sustainable operations and may be used to help increase the number of social enterprise startups in the future. Based on the study findings, social enterprise managers should consider following and implementing the recommended strategies to improve the sustainable operations of existing businesses and assist in starting new social enterprises. These strategies can be an effective way to attract employees, create a call to action, reduce turnover, enhance community well-being, improve job performance, and reduce social injustices. Managers who employ these

strategies advance the impact of social enterprises on social injustices and empower employees and the community to tackle global issues locally. P1 and P2 explained their visions as "thinking globally, acting locally."

Having social enterprise managers and entrepreneurs consider encouraging the new formation of social enterprises is crucial. Through partnerships of local global organizations with social enterprises, the manager can establish a cadence to reduce social injustice in their communities. By establishing a cadence and call to action using stories that stir emotions in patrons, the social enterprise manager can create positive motion in the business and the community.

The research findings will be distributed through multiple channels. First, a summary copy of the research will be provided to the participants to share with their peers, such as other social enterprise managers from all markets. Second, the study will be published and made available through the ProQuest/UMI dissertation database for academia and other interested parties to access. Lastly, I will actively seek opportunities to present the research findings in business-related forums, training sessions, and leadership conferences.

Implications for Social Change

The information presented in this study may add to the current literature regarding social enterprise strategies. There are not many resources to document the strategies used by social enterprise managers, and these findings may be able to help these types of businesses develop a sustainable social enterprise.

Numerous societal challenges, including economic inequality, unemployment, and an aging population, to name a few, pose significant threats to contemporary enterprises (Taylor, 2024). Consequently, stakeholders actively engage in endeavors to foster a sustainable community by addressing these pressing social issues. The social value generated by each stakeholder plays a pivotal role in mitigating these challenges. Positioned as an intermediate entity between for-profit and non-profit enterprises, a social enterprise is delineated as an organization conducting business activities with a primary focus on achieving social objectives. Social enterprises are characterized as companies operating for the public good, directed towards specific socioeconomic goals rather than mere profit maximization. While definitions may exhibit subtle variations across markets, they uniformly underscore that social enterprises operate with the primary mission of addressing societal issues. Consequently, social enterprises generate profits, contribute to the economy, and fortify their corporate standing. Simultaneously, they play a crucial role in ameliorating social issues, thereby promoting communal well-being through the cultivation of social values. Hence, the vitality of social enterprises assumes significance both in economic and national contexts (Park & Kim, 2020).

There are several reasons the economy needs social enterprise job creation and to witness social enterprises become increasingly viable and sustainable. Social enterprises often focus on addressing pressing social challenges, such as unemployment, poverty, environment, and inequality. By creating jobs within the context of their mission, they contribute directly to tackling these social issues. Job creation by social enterprises can

stimulate economic growth and community development. As these enterprises often

operate with a local or community-centric focus, the jobs they generate contribute to the

overall well-being and resilience of the communities they serve. Social enterprises often

prioritize inclusive employment practices, offering opportunities to individuals who

might face barriers in traditional job markets, such as those with disabilities, marginalized

groups, or individuals with limited access to employment opportunities. Social

enterprises aim to achieve financial sustainability while pursuing their social missions.

By creating jobs, they contribute to building sustainable economic models that balance

profitability with positive social impact. Job creation allows social enterprises to generate

revenue through their business activities. This reduces their reliance on external

charitable funding and grants, making them more self-sufficient in pursuing their goals.

Creating employment opportunities empowers individuals by providing them with the

means to support themselves and their families. This empowerment extends beyond

financial aspects to include skill development, personal growth, and increased self-

esteem. Successful social enterprise job creation serves as a demonstration of a viable and

sustainable model that integrates business practices with social impact. This can inspire

other businesses to adopt similar approaches, fostering a broader movement toward

socially responsible entrepreneurship.

Boehme et al. (2024) posited that balancing mission logic with commercial

viability is challenging for a social enterprise manager. The need for social enterprises to

be sustainable is grounded in several key considerations. Sustainability ensures that social

enterprises can maintain their operations over the long term. This longevity is crucial for achieving a lasting impact on the social or environmental issues they aim to address (Kavadis et al., 2024). Sustainable practices contribute to the ongoing effectiveness of their mission. Social enterprises exist to address societal challenges. By adopting sustainable practices, they can continue making positive contributions to their communities or causes without being reliant on short-term initiatives or external funding sources. Sustainability enables social enterprises to be financially independent. By generating revenue through their business activities, they reduce dependence on donations or grants. This financial autonomy allows them to adapt to changing circumstances and pursue their mission with greater flexibility. Sustainable practices often lead to scalable models (Fowler & Leonard, 2024). Social enterprises that can scale their operations have the potential to reach more beneficiaries, amplify their impact, and address social issues on a larger scale. Scalability is inherently tied to sustainability. Sustainable social enterprises are more likely to attract diverse forms of investment, including impact investors, who seek both financial returns and positive societal outcomes. A sustainable track record enhances credibility and attracts a broader range of supporters. Sustainability practices can enhance employee morale and stakeholder engagement. When individuals within the organization and the broader community see that the enterprise is committed to ethical and sustainable practices, it fosters a sense of pride and loyalty. Sustainable enterprises are better equipped to navigate changing economic, social, and environmental conditions (Kazemi et al., 2024). They can

withstand challenges, adjust their strategies, and remain resilient in the face of uncertainties. For social enterprises with an environmental focus, sustainability extends to environmentally responsible practices. This includes minimizing ecological impact, promoting conservation, and contributing to overall environmental stewardship.

In summary, social enterprise job creation and sustainability are instrumental in promoting social inclusion, economic development, and sustainable solutions to societal challenges, making it a crucial component of a holistic approach to addressing social issues. In essence, the sustainability of social enterprises is fundamental to achieving enduring positive change. The issue of sustainability also helps to ensure that these enterprises can effectively pursue their mission, respond to evolving needs, and contribute to a more resilient and equitable society over the long term.

Recommendations for Further Research

In Section 1, I identified five main limitations to the study. First, this pragmatic inquiry study included only the factors in this study, and any unwillingness of the participants to share the full extent of the challenges and obstacles faced when addressing social business strategies could pose a limitation. Second, social business is a niche application of a wide array of available business models. Third, the brief specified period of the face-to-face interviews and brevity of the study. Fourth, the research included the experience and knowledge of the participants. Lastly, the geographical area of the study may not apply to other regions with different economic challenges, levels of employment, and opportunities.

In this study, I planned to use a pragmatic inquiry approach to explore strategies used by social enterprise managers to conduct business in the private sector with a social mission while simultaneously achieving commercial viability. The sample was comprised of six social enterprise managers that ranged from private not-for-profit on one end of the spectrum and stock held social mission-driven entities on the other. The participants were in the Midwest region of the United States. I gathered data and validated my research findings by conducting Zoom interviews with a semistructured format, utilizing open-ended questions. I began my interview process by searching for social enterprises through the Social Enterprise Alliance and expanded that search through its members. I initiated contact with participants via email to disseminate comprehensive information about my study, employing a professional approach in soliciting their participation.

I conscientiously considered potential research biases that could arise throughout the study duration. Subsequent research endeavors should prioritize a more diverse sample size, incorporating participants from diverse business sectors, potentially extending into all areas of the social enterprise spectrum and marketplaces. The recommendation is particularly pertinent given the ease of establishing connections through email and the feasibility of conducting research via platforms such as Zoom, Skype, or Teams. There is a plethora of social business types and social missions designed to address social injustices of all kinds. To enhance the applicability of the study, it is advisable to conduct research in multiple geographical locations so as not to restrict the generalizability of the study.

I would recommend this study be duplicated in different market types and in other regions of the United States and foreign countries for several reasons. First, governments manage social business in a variety of ways under a variety of different regimes. This leads to different legislative effects on the non-profit, non-governmental organizations on one end of the spectrum. Second, strategies social enterprise managers may use to remain sustainable may not prove to be representative of other business models. Third, phone interviews alone did not allow the observation of participant body language, potentially diminishing rapport, and trust. The brevity of the pragmatic inquiry in participants and the length of questioning do not guarantee every instance and experience was covered. A study conducted over a more extensive time, with different cases and regions, could yield a more thorough analysis.

Conclusion

The revelations and feedback offered by the study participants were genuinely enlightening and motivational. Although certain strategies employed by social business managers to sustain social enterprises were within my existing knowledge, the data further unveiled inventive approaches that had not been previously contemplated. I am eager to disseminate the study findings to business owners and leaders, as I posit that such insights can contribute significantly to enhancing their competitiveness and may have the added benefit of easing the frustrations around the lack of social enterprise strategies with new social enterprise startups. My goal is for the information presented in this study to benefit anyone seeking to start new social enterprises, convert to a social

enterprise, or enhance the sustainability of an existing social enterprise. By applying these strategies to their business practices, I believe they can create positive social change within their organizations.

The future success and performance of numerous social enterprise managers depend on their ability to employ sustainable strategies to enhance the social enterprise and continue the social mission. In my study, I have identified strategies that social enterprise managers could use to manage social enterprises. The themes that were identified in my study were (a) financial well-being, (b) sustainability, and (c) community involvement. Managers of social enterprises, as well as other managerial positions, must consider various factors when implementing effective strategies. One essential element is understanding the paradox between social mission achievement and profitability (Quinn & Rohrbaugh, 1983).

The strategies identified may not universally apply to all social enterprises owing to variables such as organizational size, geographical location, and staffing dynamics. Nevertheless, it is imperative for managers and leaders to acquaint themselves with these strategies and judiciously assess their applicability, discerning those most likely to efficaciously diminish employee turnover within their specific organizational contexts.

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Appendix A: Pragmatic Inquiry Protocol

Research Study Title: Evidence Based Practice-Strategies of Social Enterprises. Here are some sample questions:

1. What skills do you use to conduct business as a social enterprise to improve business operations and profitability?

2. What financial strategies do you use to improve business operations and profitability?

3. What operational strategies do you use to improve business operations and profitability?

4. What personnel strategies do you use to improve business operations and profitability?

5. What social business processes have you used within the organization to improve business operations and profitability?

6. Is there anything else you add that would help me to understand the uniqueness of your approach that adds value to your strategies?

Interview Procedures

- Contact participant prior to meeting to check for questions, reconfirm time and location.
- In observing the COVID-19 protocols, I will conduct a zoom, telephone, or face-to-face interview to adhere to social distancing.
- The interview duration will be 45 to 50 minutes at the location and time convenient for the participant.
- I will present eight interview questions and follow up with some probing questions as needed.
- With your permission, I will record the interview using a Smartpen and other devices.

- The purpose of recording is to listen for write-up and transcription of the findings later.
- The recorded data will aid in transcribing the interview I will present to you after 3 days to confirm the accuracy of your words.
- You will receive a copy of the interview transcript for member checking and approval.
- Thank you for willingly sharing your experience with me. I will schedule follow-up member checking interview after few days to firm interview transcript.

Appendix B: Invitation Template for Email, Social Media, and Flyer Formats

There is a new study about social enterprise strategies for sustainable development that could help business leaders better understand the benefits and challenges of operating as a social enterprise. For this study, you are invited to describe your strategies about managing a social enterprise.

About the study:

- One 30-60 minute phone, Zoom, or Teams interview that will be audiorecorded (no videorecording)
- To protect your privacy, the published study will not share any names or details that identify you

Volunteers must meet these requirements:

- Business manager
- Has used strategies managing social enterprises

This interview is part of the doctoral study for Greg Rogers, a DBA student at Walden University. Interviews will take place during the months of January and February 2024.

Please reach out XXX@waldenu.edu or at XXX to let the researcher know of your interest. You are welcome to forward it to others who might be interested.

Appendix C: Themes and Applicable Codes

Themes and strategies	Codes
Theme 1: Financial Well-Being Strategy 1: Personnel Cost Reduction Strategy 2: Operational Cost Reduction Strategy 3: Financial Strategy	Cost, Expenses, Funding, Hiring, Automation, Data, Efficiency, Investment, profitability
Theme 2: Sustainability Strategy 1: Connecting Concepts Strategy 2: Efficient Use of Resources Strategy 3: Environmental Impact	Automation, Business Model, community, efficiency, energy, funding, investment, key performance measures, making a difference, operations, problem-solving
Theme 3: Community Involvement Strategy 1: Involvement in organizations with local ties Strategy 2: Servant leadership Strategy 3: Fill a need	Acting locally, change, community, location, making a difference, people, program, services, support

Appendix D: Strategies Required for a Sustainable Social Enterprise

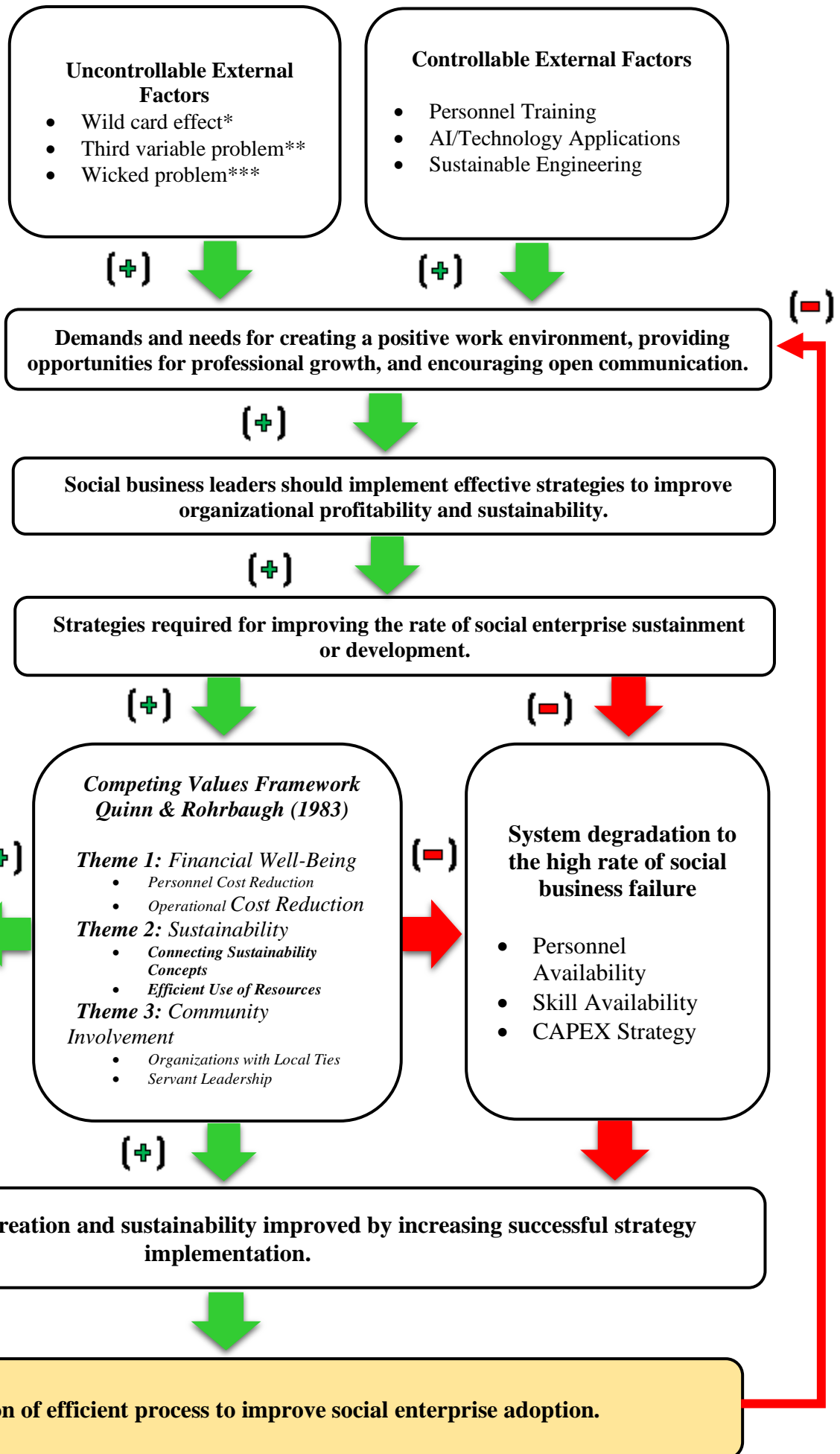# Evidence-Based Practices of Sustainable Development
Gregory R Rogers, DBA, Kenneth D Gossett, PhD., Warren P. Lesser, DBA

Feedback Model Legend

A direct (+) relationship means an increase in x leads to an increase in y; A decrease in x leads to a decrease in y. An inverse relationship (-) means that an increase in x leads to a decrease in y or a decrease in x leads to an increase in y.

This model reflects the authors' current understanding of the strategies used in social enterprise organizations. This model will be updated as indicated by additional scholarly research. We encourage and invite additional feedback and research that may improve this model.

GRR, KDG, and WPL
02/February/2024 ©

Uncontrollable External Factors
- Wild card effect*
- Third variable problem**
- Wicked problem***

Controllable External Factors
- Personnel Training
- AI/Technology Applications
- Sustainable Engineering

(+) **(+)** **(-)**

Demands and needs for creating a positive work environment, providing opportunities for professional growth, and encouraging open communication.

(+)

Social business leaders should implement effective strategies to improve organizational profitability and sustainability.

(+)

Strategies required for improving the rate of social enterprise sustainment or development.

(+) **(-)**

Strategy Improvement to the Rate of Social Enterprise Adoption

- Increased Community Involvement
- Sustainable Engineering
- OPEX Strategy Implementation
- Cashflow
- Technology Advancement

(+)

Competing Values Framework Quinn & Rohrbaugh (1983)

Theme 1: *Financial Well-Being*
- *Personnel Cost Reduction*
- *Operational Cost Reduction*

Theme 2: *Sustainability*
- *Connecting Sustainability Concepts*
- *Efficient Use of Resources*

Theme 3: *Community Involvement*
- *Organizations with Local Ties*
- *Servant Leadership*

(-)

System degradation to the high rate of social business failure

- Personnel Availability
- Skill Availability
- CAPEX Strategy

(+) **(+)**

Social Enterprise job creation and sustainability improved by increasing successful strategy implementation.

Implementation of efficient process to improve social enterprise adoption.

Appendix E: Social Enterprise Continuum

	Traditional not-for-profit NGO	Income Generating non-profit NGO	Reliant Social Enterprise	Sustainable Social Enterprise	Sustainable Socially Responsible Business	Traditional Business
Source of Income	Grant, Donations, or Other Government Funding	Grant or Donations, with Minimal Traditional Market Share Capture	Traditional Market Share Capture with Some Donations or Grants	Traditional Market Share Capture	Traditional Market Share Capture	Traditional Market Share Capture

Note: The data represented in the continuum table above is a direct experience from the research I conducted and in no way represents any other data experienced by other authors.