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Strategies Leaders of Nonprofits Use to Increase Community Awareness and Capital Funding

Michael Beverly, Jr.
Walden University

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Walden University

College of Management and Human Potential

This is to certify that the doctoral study by

Michael Beverly. Jr.

has been found to be complete and satisfactory in all respects,
and that any and all revisions required by
the review committee have been made.

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Walden University
2024

Abstract

Strategies Leaders of Nonprofits Use to Increase Community Awareness and Capital
Funding

by

Michael Beverly. Jr.

MBA, Bellevue University, 2014

BSBA, Creighton University, 2010

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

Walden University

March 2024

Abstract

Nonprofit leaders' ability to establish and sustain effective awareness of their mission-oriented work with organizational stakeholders affects performance and sustainability.

The failure to implement community awareness strategies and obtain capital funding through donations and contributions can adversely affect nonprofit leaders' ability to ensure that their organizations can provide services and support to communities.

Grounded in stakeholder theory, the purpose of this qualitative single case study was to explore strategies that nonprofit organization leaders use to increase community awareness to catalyze capital funding. The participants were three senior leaders of a nonprofit organization in the mid-Atlantic region that successfully obtained funding for a minimum of 5 years. Data were collected using semistructured interviews, review of organizational documents and reports, analysis of financial records and reports, and social media posts and annual reports. Through thematic analysis, five themes were identified: (a) strategic partnerships, (b) alignment of stakeholder needs and strategic objectives, (c) strategic stakeholder communication, (d) community engagement, and (e) communication feedback loop between the organization and customers (recipients). A key recommendation is for nonprofit leaders to regularly perform strategic planning, process improvement, performance management, and strategies such as scenario planning and what-if analysis to identify opportunities to increase their community awareness and capital funding needs. The implications for positive social change include the potential to provide more programs, services, and employment opportunities to individuals, customers (recipients), communities, and society.

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Dedication

I dedicate my academic research to my grandmother, Willena Webb, who inspired me to achieve this educational endeavor. She lost her life suddenly due to a heart attack, but the wisdom imparted to me has not been forgotten. She instilled the critical components of a positive mindset, perseverance, and leadership. There has always been a call to action from my grandma to dig deeper and follow through until completion. I can say with certainty that without these defining principles in my life, I wouldn't have been able to complete the DBA program. I dedicate this to you, Grandma; thank you for believing in me when others didn't.

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First and foremost, I thank Dr. Janice Garfield, my first chair and mentor, for providing guidance, positivity, and constructive feedback on my research, writing, and path toward becoming an independent academic scholar. I wouldn't have gotten to the point in my doctoral journey without her intellectual curiosity, honesty, and providing a smooth handoff to my second chair, Dr. Meridith Wentz. This leads me to my second thank you to Dr. Meridith Wentz for stepping in right where Dr. Garfield left off and providing guidance toward completing this journey. Your 'subtle' nudges of encouragement and motivation through your 'checking in' emails provided the push to overcome significant hurdles and milestones towards completing this journey. I thank my Walden University and residencies faculty and staff who helped me with constructive feedback and encouragement to the end of this research and completing my Doctor of Business Administration degree. I thank my wife, daughter, and son, who supported me in this academic pursuit and accomplishment, extending grace and mercy as I spent time alone writing and researching. I thank my circle of friends for your consistent positive words, advice, and encouragement to finish no matter the odds and find joy in the process. Finally, I want to thank my client organization and leadership team for allowing me to pry into their organizational operations to provide feedback and opportunities for improvement and efficiencies.

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Section 1: Foundation of the Study

Identifying funding sources and marketing strategies to sustain small-to-midsized nonprofit businesses remains challenging. Berman et al. (2018) identified that donors often believe supporting a charity they connect with emotionally is more important than with a charity that does the most good. Fajardo et al. (2018) emphasized that conducting a solicitation (direct mail, in-person, and online) with donor-related information can lead to a higher donation rate than a solicitation with mixed appeals (solicitations featuring both donor and organization related appeals), indicating that donor-related information benefits only donation choice (i.e., whether to donate) in the absence of organization-related information. Kearns et al. (2014) found that nonprofit leaders describe catalyst as the extent to which a funding source provides an opportunity for other funding sources or other valued commodities, including community support, partnerships, public relations, legitimacy, and volunteerism. As a scholar-consultant in Walden's DBA Consulting capstone, I used the 2021-2022 Baldrige Performance Excellence Program (2021) and criteria to conduct a holistic evaluation of an assigned client organization.

Background of the Problem

During the Great Recession of 2008, nonprofit leaders experienced major financial losses because funding sources decreased significantly or vanished, while the need for public assistance increased (Walters, 2019). Although nonprofit leaders recognize a demand for increased services in recessions, their organizations may need more funds to meet the needs because of funders' and watchdogs' expectations of lean operations (Johnson et al., 2021). To restore insolvent nonprofits to solvency would

require a capital injection of \$40 to \$50 billion (Morris et al., 2018). The scholarly data depict a need for nonprofit organization leaders to develop a financial strategy to foster financial stability to continue to provide program services to their respective communities.

Nonprofit organization leaders have positioned themselves as fundraisers to garner donations. The actions that nonprofit leaders implement to raise money may determine their outcomes, and different fundraising actions signal other priorities of donors' willingness to donate (Chapman et al., 2019). Individual donors consult ratings and rankings of nonprofits based on normative financial standards, while many institutional funders require nonprofits to meet specific standards as conditions for grant and contract eligibility (Mitchell, 2017). Charitable gift revenue is more dependent on megagivers, whereas smaller individual donors may be unable to give as much (Johnson et al., 2021).

Funders should closely consider nonprofits' services and how to effectively support organizations (Zimmerman, 2020). Donations are a transient revenue source, and donors' direct ties to the organization create a network supportive of the innovative process (Ranucci & Lee, 2019). Between 56% and 81% of people in the United States, the United Kingdom, and Australia donate to charity in any given year (Chapman et al., 2021). Nonprofit leaders develop donation strategies to generate donations for their organizations. Each donor will have their criteria and basis for their aptitude to donate; thus, understanding donors' behavior is a constant learning opportunity for nonprofit organization leaders.

Problem Statement

While leaders in nonprofit organizations (NPO) have similar roles to those of leaders in the business sector, they also face unique specificities: managing volunteers, donations, limited resources, typically lower salaries, and competition with other talent-seeking sectors (do Adro & Leitão, 2020). The nonprofit sector employs over 850,000 people, as well as harnessing 21 million volunteers (Mitchell & Clark, 2022). The general business problem is that some leaders of nonprofit organizations lack strategies to increase community awareness and capital funding, which can adversely affect nonprofit leaders' ability to ensure that their organizations can provide services to support communities. The specific business problem to be addressed in this research is that some nonprofit business leaders lack strategies to increase community awareness to catalyze capital funding.

Purpose Statement

The purpose of this qualitative single case study was to explore strategies that nonprofit organization leaders use to increase community awareness to catalyze capital funding. The targeted population was comprised of three senior leaders from a single NPO located in the mid-Atlantic region of the United States who have implemented successful community awareness strategies that led to increased donations. The research will contribute to positive social change with the potential to provide significant knowledge to organizational leaders conducive to minimizing the impact of community awareness strategies and disrupting capital funding needs. Positive social change may result if leaders of the organization can become viable members of their local

communities, and the organization is able to create and maintain jobs, reduce unemployment, and educate members of the community they serve.

Nature of the Study

I used qualitative research methodology for this study. Researchers use the qualitative method to study individuals and organizations and their reasons, opinions, motivations, and beliefs in their natural settings (Chandra & Shang, 2019). The qualitative method is appropriate for my study because the main objective was to explore the strategies that nonprofit organization leaders use to increase community awareness to catalyze capital funding. Conversely, quantitative methodology researchers analyze numerical data by describing the phenomena of interest or looking for the difference between groups or relationships among variables (Tashakkori & Teddlie, 2021). To explore strategies NPOs use to increase community awareness and capital funding, I did not analyze numerical data or test hypotheses, which is part of the quantitative study. Therefore, the quantitative method was not appropriate for this study.

The specific research design was a single case study to address the research question in this qualitative study. This approach is appropriate for this study because researchers use the qualitative method to understand phenomena within a specific context (Yin, 2018). I selected the qualitative method to use open-ended questions to gather, analyze, interpret, and present narrative information that participants provide in their own words in response to open-ended questions. Stake (1995) states that qualitative case study researchers exploit observation, interview, and document review as data gathering tools (Yazan, 2015). The researcher uses qualitative techniques to gather, analyze, interpret,

and present narrative information that participants provide in their own words in response to open-ended questions (Tashakkori et al., 2020).

Research Question

What strategies do NPO leaders use to increase community awareness to catalyze capital funding?

Interview Questions

1. How do you listen to, interact with, and observe donors to obtain actionable information?
2. How do you develop strategies for fundraising?
3. How do you build and manage relationships with recipients of your services, and the impact this has on any donation campaign appeal?
4. How do you enable donors to seek information and support?
5. How do you determine donor satisfaction, dissatisfaction, and engagement?
6. How do you obtain information on donors' satisfaction with your organization's services relative to other organizations?
7. How do you use the voice-of-the-program service recipient and market data and information to garner donor support?
8. What else do you want to say about your strategies to increase community awareness to catalyze capital funding?

Conceptual Framework

I chose Freeman's (1984) stakeholder theory as the conceptual framework for this study, as it is a strategic management approach based on the premise that leaders must

consider the needs and demands of stakeholders and a wide range of external constituents who can affect and be affected by achieving the organization's objectives (Valentinov & Hajdu, 2019). The users of the theory are organizations that consider the needs and demands not only of their shareholders but also those of a wide range of other external constituencies or stakeholders. Freeman (1984) defined a stakeholder broadly as any group or individual who can affect or is affected by the achievement of the organization's objectives. Valentinov and Hajdu (2019) argued that stakeholder theory and nonprofit stakeholder theory draw on the simple and fundamental idea that a business has stakeholders, some groups, and individuals who have a stake in the success or failure of a business.

Nonprofit leaders have difficulty prioritizing each stakeholder group's needs while balancing their interests and demands. LeRoux (2009) stated that stakeholder theory's interest in the turbulence of the business environment or the need of nonprofits to balance stakeholder interests aligns with a particularly big challenge nonprofit leaders face, feeling that all stakeholder interests have intrinsic worth. Stakeholder theory states that an important component of value creation in organizations and businesses that enhances their chances of success is their engagement and developing strong relationships with various stakeholders (Leonidou et al., 2020). Private donors, governmental agencies, beneficiaries, competitors, volunteers, staff, and board members include the wide range of stakeholders holding a certain degree of power over the organization's mission, activities, and effectiveness, a fundamental challenge for

nonprofit leaders to navigate in a setting of complex power structures (Schubert & Willems, 2021).

The stakeholder theory is an appropriate conceptual lens through which business leaders can select a strategy to exploit internal and external resources and capabilities relative to external opportunities. Through the lens of stakeholder theory, I can use the findings of my study to gain insight into the strategies NPO leaders use to increase the effective use of internal resources when seeking to build community awareness of the organization's mission activities to attract capital funding to sustain operations. Stakeholder theory is suitable for this study to understand the strategies NPO leaders employ to build relationships with external stakeholders and the organization's ability to increase community awareness to achieve catalyzing capital funding objectives more effectively.

Operational Definitions

The following are definitions of concepts used in this study:

Baldrige Performance Excellence Framework: A holistic management and leadership tool used by senior leaders to address a dynamic environment, focus on strategy-driven performance, achieve customer and workforce engagement, and improve governance and ethics, societal responsibilities, competitiveness, and long-term organizational sustainability (Baldrige Performance Excellence Program, 2021).

Catalyst: Kearns et al. (2014) defined catalyst as the extent to which a funding source provides an opportunity for other funding sources or other valued commodities,

including community support, partnerships, public relations, legitimacy, and volunteerism.

Nonprofit organization: Munik et al. (2021) described nonprofit organizations as organizations whose leaders' efforts are directed toward the benefit of society with a strong orientation toward their mission and creation of social value; they are also demanded (e.g., by the public in general, volunteers that commit to their purpose and government agencies, among other stakeholders) to reflect social responsibility, transparency of the results and proper governance.

Stakeholder theory: The stakeholder theory is the organization's main purpose to attend to, coordinate, and integrate relevant constituents' different interests to ensure that each stakeholder group distributes high-value inputs to the specific organization (Mato-Santiso et al., 2021).

Stakeholders: The stakeholders are all groups that are or might be affected by the organization's actions and success (Baldrige Performance Excellence Program, 2021). Key stakeholders might include customers, the workforce, stockholders, suppliers, partners, collaborators, the public, and the community (Baldrige Performance Excellence Program, 2021).

Assumptions, Limitations, and Delimitations

Assumptions

Mackieson et al. (2019) determined that assumptions can be found in the framing of a research question, the choice of the theoretical model, the selection of the subjects or sources of data, the nature of the questions asked during interviews, or the selection of

sampling, counting and analytic methods used. Poucher et al. (2020) stated that for a study to be methodologically coherent, researchers must know the philosophical assumptions underpinning their research and select the most appropriate methods to achieve their intended research aims. I made four assumptions in this study. First, I assumed that the chosen nonprofit senior leaders answered the interview questions honestly. Second, I assumed that a single-case study design was most appropriate. Third, I assumed that a sample size of three nonprofit senior leaders from a single nonprofit organization in the mid-Atlantic region of the United States was adequate. Lastly, I assumed that using the 2020-2021 Baldrige Performance Excellence Framework and criteria as a tool to evaluate my client organization provided a systems-based perspective for the evaluation of the research question.

Limitations

Limitations are potential areas of weakness associated with a research study (Theofanidis & Fountouki, 2018). A limitation of my study was the available pool of participants and focusing on one specific nonprofit organization in a defined geographic area, limiting overall data collection. Additionally, the participant sample size potentially limited the transferability of study results to nonprofit organizations of comparable size.

Delimitations

Theofanidis and Fountouki (2018) determined that delimitations are the boundaries of a study set in place to achieve the study's objective. I identified three delimitations for this study. The first delimitation was that the participating nonprofit organization leaders must meet the eligibility criterion, which was establishing a capital

campaign funding strategy that could be sustainable and successful over the 3-year period. The second delimitation was choosing the mid-Atlantic region of the United States as the geographic region for the study. The third delimitation was conducting virtual interviews using Zoom and telephone interviews, asking open-ended questions.

Significance of the Study

This study is significant to business practice because it provides a practical model for understanding strategies to increase community awareness and capital funding. Sustainability is a strategic concern for NPO leaders. Organization leaders who engage in community activities raise awareness of their mission and enhance their community profile (Browning et al., 2020). My study's findings are significant to business practice by helping identify strategies that enable NPOs to establish relationships with the community to increase revenue through private and corporate donations to sustain operations. By strengthening the interface with their local communities to create mission awareness to increase revenues, NPO leaders could achieve sustainability for their organization.

The influence of the results of this study can extend beyond the single case as other NPO leaders use or adapt the findings to develop strategies to increase donations to sustain their organizations, thus perpetuating or expanding the ability of NPOs to provide services, goods, and resources to those in need. However, this study's implications for positive social change extend beyond the business environment to benefit individuals and families needing specialized services.

Contribution to Business Practice

This study is of value to business practice because of the leadership perspectives gained by senior nonprofit leaders challenged with stabilizing nonprofit organizations through catalyzing capital funding. Nonprofit Finance Fund (2014) determined that nonprofits continually report that fundraising represents a major challenge preventing them from meeting the demand for their services. Leaders of nonprofit organizations searching for strategies to increase community awareness to catalyze capital funding from individual donations and corporate sponsorships may benefit from or reduce the potential for business or organizational failure by accessing the results of this study. Furthermore, many people in charge of fundraising for nonprofits readily admit they do not know how to stabilize their donor base or revenues (Fajardo et al., 2018). Contributions from this study include an increase in the understanding of strategies nonprofit senior leaders used for increasing community awareness to catalyze capital funding and the opportunity to maximize the presence of the nonprofit organization within the local community by helping the population served through the services provided by the nonprofit organization.

Implications for Social Change

When a nonprofit finds it challenging to be perceived as prestigious, its message should focus on the status of its value to society and its community; in effect, building prestige through the donor's desire to associate with the organization and share in the status (Peasley et al., 2018). Stephan et al. (2016) stated that positive social change alters social structures, institutions, relationships, and thought patterns to produce advantageous

outcomes for people, communities, organizations, society, and the environment. The implications for positive social change include the potential to provide significant knowledge to organizational leaders conducive to minimizing the impact of community awareness strategies and disrupting the capital funding needs. Positive social change may result if leaders of an organization become viable members of their local communities, and the organization can create and maintain jobs, reduce unemployment, and educate members of the community they serve.

A Review of the Professional and Academic Literature

The purpose of this qualitative single case study was to explore strategies that NPO leaders use to increase community awareness and capital funding. Extensive research based on stakeholder theories helps researchers understand NPO leaders' strategies to support their organizations. The literature review is an essential feature of academic research; by reviewing the literature, readers of the study understand the breadth and depth of the existing body of work (Xiao & Watson, 2019). This study aimed to address the literature gap by exploring nonprofit organizations' leader's community awareness and capital funding strategies.

Researchers perform keyword searches to narrow their search to relevant literature (Yin, 2018). The key search words and phrases used when searching the databases included *nonprofit*, *non-profit*, *not-for-profit*, *private sector*, *capital campaign*, *the charity sector*, *stakeholder*, *stakeholders*, *stakeholder theory for nonprofits*, *ST*, *stakeholder theory*, *community awareness*, *community engagement*, *capital funding*, *fundraising*, *nonprofit funding sources*, and *nonprofit revenue*. Databases included the

Thoreau Multi-Database Search tool to identify and access journal articles in the Walden University Library databases. Online databases searched included EBSCOHost, Emerald Publishing, Pearson Education, ProQuest Central, Sage Journals, Sage Premier, and Science Direct for December 2019 to August 2023. To supplement these search efforts, I used Google Scholar to identify additional relevant information and gained access through the Walden University Library. In addition, I used a collection of peer-reviewed journal articles, dissertations, and textbooks to strengthen the literature review. Table 1 provides an overview of my literature review source content.

Table 1

Literature Review Source Content

Descriptor	Number
Total number of references	172
Total number of references used that are 5 or less years old (2019-2023)	155
Percentage of references used that are 5 or less years old (2019-2023)	90%
Total number of references that are peer-reviewed	152
Percentage of peer-reviewed references:	88%

I organized the literature review into three major sections. In the first section, I explored the research on stakeholder theory, which I chose as the conceptual framework for the study. In the third section, I explored the nonprofit organization model, its nature, characteristics, and challenges. In the third section, I synthesized the conceptual framework, stakeholder theory, the NPO model, NPO impact measurement, capital funding, and community outreach into a foundation for my exploration of the strategies NPO leaders use to increase community awareness to catalyze capital funding.

Application to the Applied Business Problem

The business problem I addressed in this research was that some nonprofit business leaders lack strategies to increase community awareness to catalyze capital funding. Nonprofit organizations are crucial in addressing social problems and responding to the needs of the most vulnerable and marginalized people in communities (Yang, 2021). Nonprofit sector leadership fosters relationships with stakeholders to fulfill society's needs not served by the public or private sector. NPOs must establish vibrant relationships with their multiple stakeholders to promote their access to resources and withstand the augmenting pressure of the markets to ensure their survival (Andersson, 2016; Stock & Erpf, 2022). Nonprofit organizations (NPOs) must maintain effective relationships with a growing multiplicity of stakeholders with divergent interests (Mato-Santiso et al., 2021). Some challenges become present for NPO leaders engaged in making an impact.

The challenges for NPO leaders showing their impact on society, increasing their accountability practices, and recruiting people in competitive environments address a stakeholder management perspective because NPO leaders need to satisfy each stakeholder's expectations towards realizing their engagement in society (Balser & McClusky, 2005; Barber & Bowie, 2008; Barreal & Pepermans, 2019; Cavill & Sohail, 2007; Mook et al., 2015). Social impact enables NPO internal stakeholders, including the board, management, and staff, to assess their performance and improve the effectiveness of service delivery and mission achievements (Ógáin et al., 2012; Yang, 2021). Second, social impact helps NPOs maintain effective accountability relationships with their key

stakeholders, such as funders and beneficiaries (Moxham, 2010; Yang, 2021; Yang & Northcott, 2019). Vibrant relationships with external stakeholders are relevant to saving limited resources, ensuring efficiency, and enhancing the mission-related organization goals, thanks to an ideally broader supporting community (Lacerda et al., 2020).

By researching and assembling relevant academic literature aligned with the purpose of my qualitative single case study, I explored the strategies of nonprofit organization leaders to increase community awareness and capital funding. I codified my aligned academic literature, yielding several thousand articles that I pruned to 172 by focusing the search on external stakeholders. Upon reviewing the articles and resources, the underlying strategic themes and conceptual framework related to Freeman's (1984) stakeholder theory.

Stakeholder Theory

Freeman (1984) developed the stakeholder theory that states organizations must consider the needs and demands not only of their shareholders but also of a wide range of other external constituencies or stakeholders. Since Freeman (1984), there have been contributions to developing stakeholder theory by comparing and contrasting theorists. Among the contrasting theorists are Donaldson and Preston (1995), who distinguished three varieties of stakeholder theory; the theory is descriptive if there presents a model describing what a corporation is; normative if the theory assumes stakeholders to be persons or groups with legitimate interests in procedural and substantive aspects of corporate activity; and instrumental if the theory is used to identify the connections, or lack of connections, between stakeholder management and the achievement of traditional

corporate objectives. In this section, I explore stakeholder theory, contrasting theorists, and comparing theories to support stakeholder theory as the appropriate conceptual framework for exploring the business problem and answering the research question.

Stakeholder theory stresses the need for managerial attention to all stakeholders in a balanced way to achieve sustainable organizational success (Barreal & Pepermans, 2019). Valentinov and Hajdu (2019) argued that stakeholder theory draws on the simple and fundamental idea that a business has stakeholders, which are groups and individuals that have a stake in the success or failure of a business (Dyer et al., 2020). Florea and Florea (2013) stated that stakeholders are the group that, without their support, the organization could cease to exist. NPOs have been characterized as multistakeholder organizations that maintain several relationships with numerous specific constituencies that can be considered strategically important as resource providers (e.g., unpaid board members, other volunteers, donors, members) or as targets of NPOs' public benefit missions (e.g., recipients or beneficiaries, communities, society; Mato-Santiso et al., 2021). NPO leaders have the opportunity to manage several relationships with stakeholders.

NPO leaders can create or shape a stakeholder relationship. Leaders of an enterprise should shape relations with a wide range of stakeholders to succeed in the market and ensure sustainable development (Epstein & Rejc, 2014). Most leaders engage in considerable stakeholder management activities; therefore, it is imperative for leaders to proactively deploy a systematic approach to stakeholder management (Dyer et al., 2020). Kujala et al. (2022) stated that it is vital to have stakeholder engagement in crucial

organizational activities, such as value creation, strategic planning and decision-making, innovation, learning, knowledge creation, and corporate social responsibility. Stakeholder engagement can foster buy-in on crucial organizational activities.

Freeman (1984) defined the basis of stakeholder theory. Although stakeholder theory originates from traditional shareholder theory, stakeholder theory aims to set up a more equilibrated distribution of the benefits from operating results among nonshareholders and shareholders (Cao et al., 2021). Executives and managers spend an enormous time managing the needs, demands, and relationships with stakeholder groups. Scholars widely use stakeholder theory to evaluate business evolution, ethical dilemmas, corporate governance, corporate social responsibility, mergers and acquisitions, and other organizational issues at a comprehensive level (Cao et al., 2021). Stakeholder theory provides a framework for managers to be clear about how they want to do business, specifically what relationships they want and need to create with their stakeholders to deliver on their purpose (Freeman et al., 2004). Stakeholder theory is defined by the organization's main purpose to attend to, coordinate, and integrate relevant constituents' varying interests to ensure that each stakeholder group distributes high-value inputs to those organizations (Mato-Santiso et al., 2021). Senior leaders and managers can define and identify stakeholders and their interests.

Defining and identifying stakeholders is essential to understanding their interests and determining the required attention and resources senior leadership and managers need. The change towards a stakeholder-oriented approach to relationships arises from leaders' adoption of stakeholder theory, which promotes the need to manage relationships

with multiple stakeholders and integrate their interests (Freeman, 1984). Relationships with stakeholders can provide senior leadership and managers with resources and information to impact the nonprofit organization strategically. The capacity to use and analyze the information generated by interactions with stakeholders is crucial; developing the critical capability for the synergistic coordination of multiple contact points requires adequate resources (Mato-Santiso et al., 2021). NPO leaders are involved in developing and deploying resources for their organization.

Adequate resources for nonprofit organizations involve relationships, finances, people, and operational resources. NPOs must convince society that they have systems in place to assess the prudent management of received resources and funds (Ortega-Rodríguez et al., 2020). The scarcity of resources (finances and people), in combination with competition among a growing number of nonprofits, has forced NPO leaders to develop other new managerial capabilities (Mato-Santiso et al., 2021). Obtaining private resources through nonprofit business partnerships is an option for NPO leaders to ensure long-term survival (Mato-Santiso et al., 2021). However, strategic collaborations with businesses have to go beyond mere monetary donations and imply developing more specific resources and effectively building stakeholder relationships (Álvarez-González et al., 2017). NPO leaders' relationships with stakeholders provide value to doing business within their industry.

Stakeholder theory underlines assumptions about leaders' and managers' ability to conduct business. Stakeholder theory begins with the assumption that values are necessarily and explicitly a part of doing business (Freeman et al., 2004). This

assumption has served stakeholder theorists in developing the theory and deploying its relatability and use in doing business. Stakeholder theory speaks to the importance of implementing innovative practices that engage stakeholders and achieve value creation and shared risk (Freeman et al., 2004; Mato-Santiso et al., 2021). Bundy et al. (2018) also supported that management can benefit more from cooperative behavior by effectively sharing values and strategies and aligning their interests with stakeholders. NPO leaders who share values and strategies with their stakeholders allow for opportunities to have open and constructive dialogue amongst each group.

Stakeholder theorists have characterized stakeholder theory as divided into three tenets that are differentiated from Donaldson and Preston's (1995) three varieties of stakeholder theory. Strand and Freeman (2013) presented the three tenets of stakeholder theory (i.e., jointness of interest, cooperative strategic posture, and rejections of a narrowly economic view of the firm) to distinguish a business or organization's stakeholder engagement (Shah & Guild, 2022). According to theorists Strand and Freeman (2013), jointness of interest enables organizations to create value by exerting effort to align their interests with the interests of their stakeholders (Shah & Guild, 2022). The jointness of interest approach allows businesses and organizations to align their interest with their stakeholders. Similarly, cooperative strategic posture is a tenet of stakeholder theory that encourages the development of harmony amongst businesses and stakeholders as cooperating partners (Shah & Guild, 2022). Finally, the rejection of a narrow economic view of the firm guides leaders to downplay the phenomenon of profit maximization as the firm's sole objective (Shah & Guild, 2022). The opportunity to

explore contrasting theories to stakeholder theory offers a lens of in-depth research to support my conceptual framework.

Contrasting Theories to Stakeholder Theory

Other theorists have criticized using the three tenets of stakeholder theory because doing so does not lend to optimal decision-making to solve crucial managerial problems. Hill et al. (2021) stated that employing a multi-stakeholder perspective is recommended for optimal decision-making because this kind of stakeholder thinking also provides simple tools for managers to deal with a complex postpandemic world. Furthermore, stakeholder theorists Harrison and Wicks (2021) added that poor decision-making processes of managers cause the study of the value destruction construct. Value destruction will allow organizational decision-makers to understand better the cost of missing strategic opportunities (Shah & Guild, 2022). The critical differences between theorists underscore the implications of stakeholder theory within operations and governance.

Scholars widely use stakeholder theory to evaluate business evolution, ethical dilemmas, corporate governance, corporate social responsibility, mergers and acquisitions, and other organizational issues at a comprehensive level (Cao et al., 2021). This scholarly viewpoint has furthered the research on stakeholder theory to include stakeholder engagement. Stakeholder engagement is defined as procedures, solution development and usage, cocreation, and interactions (Leonidou et al., 2020). Given development trends and the significance of stakeholders, the stakeholder engagement system deepens the research from a systematic perspective to support the sustainable

development of the business industry (Cao et al., 2021). Stakeholder engagement provides another lens for leaders and managers to explore stakeholder relations.

Scholars and practitioners have used the construct of stakeholder engagement to refer to various processes and strategies that firms and other organizations implement in their stakeholder relations (Aakhus & Bzdak, 2015; Calton, 2006; Freeman et al., 2017; Greenwood, 2007; Kujala et al., 2022; Kujala & Sachs, 2019; Mitchell et al., 2022; Noland & Phillips, 2010). In most businesses and societies, as well as management and strategy, researchers base stakeholder engagement research on stakeholder theory (Greenwood, 2007; Henisz et al., 2014; Kujala et al., 2022; Lindgreen & Swaen, 2010; Noland & Phillips, 2010). Stakeholder theory places stakeholders at the center of strategic thinking and positions relationships with stakeholders as a focus of analysis (Freeman, 1984). Research has utilized the stakeholder engagement construct in exploring numerous issues; the overlap of the business and society and the management and strategy literature is evident because the literature of both disciplines focuses on similar issues (Kujala et al., 2022). Managing stakeholders' engagement is essential for senior leaders within an organization.

Managing the stakeholders' engagement can encourage senior leadership and organizations to consider implementing corporate social responsibility (CSR). Corporate social responsibility captures an organization's commitment to and engagement with multiple stakeholders; integrates economic, social, and environmental concerns into sustainable policies; and enhances employee perceptions, emotions, long-term value creation, and financial success (Zhou et al., 2018). Corporate social responsibility can

help companies and management build social capital with their community to increase awareness. Dyck et al. (2019) stated that high CSR companies build social capital through their CSR activities, which pays off when there is a shock to overall trust. Corporate social responsibility can be vital in highlighting a company's performance and contribution (Hossain et al., 2020). The completion of researching contrasting theories of stakeholder theory presents an opportunity to research comparable theories to stakeholder theory.

Comparable Theories to Stakeholder Theory

Other theorists have provided new approaches to the study of stakeholder theory. Donaldson and Preston (1995) described three threads of research that contribute to stakeholder theory, including descriptive research, instrumental research, and normative theory. Descriptive research describes how (or not) organizations manage stakeholders and their relationships, which justifies stakeholder theory by demonstrating that many organizations already account for more than shareholder interests (Hickman & Akdere, 2019). Instrumental research attempts to establish positive outcomes on traditional performance measures (e.g., profit) when stakeholder orientation or performance is the independent variable (Hickman & Akdere, 2019). Finally, the normative theory describes what companies should do and provides a moral foundation for the other forms of stakeholder theory (Hickman & Akdere, 2019).

Managers and leaders find that in order to create value sustainably and ethically, it is necessary to balance the interests of various stakeholders (de Gooyert et al., 2017). Freeman and Reed (1983) distinguish between a wide and narrow definitions of

stakeholders (Ashta & Hudon, 2009; Reynolds et al., 2006). In the wide definition, Freeman and Reed (1983) include any identifiable group or individual who can affect the achievement of an organization's objectives or who is affected by the achievement of an organization's objectives (Ashta & Hudon, 2009). This group of stakeholders would be made up of external stakeholders. In a narrower definition, they include any identifiable group or individual on which the organization is dependent for its continued survival (Ashta & Hudon, 2009; Freeman & Reed, 1983). This group of stakeholders would comprise all stakeholders, including internal stakeholders (management, employees, board of directors, and board committees). Stakeholder theory is a firm-level theory whose central admonition is that managerial attention should be paid simultaneously to the legitimate needs of multiple entities (groups) (Phillips et al., 2003; Pinto, 2019). Executives and managers spend most of their time interacting with and managing the demands and needs of the different stakeholder groups (Dyer et al., 2020). I chose to focus on external stakeholders in my study because they are the group most impacted by the business problem.

Jones and Wicks (1999) attempted to link stakeholder theory's instrumental and normative strands by arguing that stakeholder trust and cooperation provide economic value to a business or organization (Hickman & Akdere, 2019). In addition, instrumental research is inherently descriptive because independent variables are observed and measured but not manipulated (Hickman & Akdere, 2019). Donaldson and Preston (1995) furthered their research of stakeholder theory by concluding that the theory is managerial in nature and recommends actions and attitudes. Scholars, researchers, and

academics in NPO strategy have suggested that NPO leaders, to run NPOs successfully and deliver the mission and organizational objectives efficiently, use leadership strategy to manage stakeholders, including funders and donors (Fernandes & da Silva, 2015; Gianfelici et al., 2018; Park et al., 2018). Therefore, as the conceptual framework, stakeholder theory provides the appropriate lens for exploring the business problem and answering the research question.

Nonprofit Funding

My assigned client for this study was a nonprofit organization. Nonprofit organizations (NPOs) play a crucial role in addressing social problems and responding to the needs of the most vulnerable and marginalized people in communities (Yang, 2021). Nonprofit organizations (NPOs) often face the dual task of achieving mission-related goals while maintaining a healthy financial condition that ensures organizational survival (Carroll & Stater, 2009). NPO leaders often find themselves in a starvation cycle to keep overhead low by focusing more on delivering their services than on having the necessary organizational or financial slack to develop further (Stühlinger & Hersberger-Langloh, 2021). Nonprofit leaders operate in competitive markets for scarce public and private resources, including charitable donations, volunteers, grants, and government contracts (Faulk et al., 2017). Nonprofit organizations' financial sustainability depends on their ability to attract donors' resources, which is a challenging task in a resource-scarce external environment (Modi & Sahi, 2021). NPOs' financial sustainability can be achieved through stakeholder and donor support and by allocating each group's resources.

Stakeholders support NPOs through diverse funding and financing mechanisms; the sources of income should, therefore, be consistent with the nature of services and goods offered to the providers of these resources (Stühlinger & Hersberger-Langloh, 2021). NPOs can lawfully receive donations from stakeholders but cannot distribute revenue to them, which may give rise to various organizational practices (Gee et al., 2023). A high market orientation characterizes the nonprofit sector, and most organizations seek to create favorable perceptions among stakeholders and build relationships with them (Becker, 2018; Boenigk, 2014). Nonprofit leaders have implemented different segment orientations and strategies to create and build relationships.

Market orientation (MO) is a valuable organizational culture focused on creating superior value for the key external stakeholders (Modi & Sahi, 2021; Narver & Slater, 1990). Modi and Mishra (2010) translated this view of MO for NPOs by identifying beneficiaries, donors, and peer NPOs as the key external stakeholders whose stated or latent requirements a market-oriented NPO should strive to understand and meet in a coordinated manner regularly. Market-oriented NPOs still need to build relationships with the volunteers and supporters (Modi & Sahi, 2021; Wymer et al., 2015), which helps in fundraising (Brady et al., 2011; Modi & Sahi, 2021). NPO leaders can use market orientation as a strategy and tool for funding and revenue generation.

New revenue strategies may include raising more private donations, borrowing and using accumulated reserves, or diversifying revenue portfolios. Increasing earned income through selling goods and service fees is another new revenue strategy (Cheng &

Yang, 2018). The concept of revenue diversification is derived from the Modern Portfolio Theory articulated by Markowitz (1952), which describes the process by which an investor selects a particular investment portfolio (Carroll & Stater, 2009). Revenue diversification is generally considered a necessary strategy to effectively support nonprofit missions in an increasingly challenging resource environment (Álvarez-González et al., 2017; Carroll & Stater, 2009; Fischer et al., 2011). Although the nonprofit sector is unique in its methods of raising capital (Carroll & Stater, 2009; Steinberg, 1990), revenue diversification is nonetheless applicable as a prudent revenue generation strategy to potentially minimize the volatility of revenue portfolios managed by nonprofit organizations (Carroll & Stater, 2009; Chang & Tuckman, 1996; Jegers, 1997; Kingma, 1993). Differentiation of funding sources can provide the opportunity for multiple revenue streams for NPO leaders and the organization.

Nonprofits receive funding from multiple revenue sources, including private contributions and earned program revenues (Fischer et al., 2011). Someone (for example, donors, beneficiaries, or the public sector) benefits from a product or service provided by an NPO, and depending on who benefits, different (appropriate) income sources are available to the NPO (Stühlinger & Hersberger-Langloh, 2021). NPOs seek to acquire and manage the flow of financial (funding and grants), physical (land, offices), human (skilled employees and volunteers), and reputational, i.e., name, fame and contacts, and informational resources (Modi & Sahi, 2021). Charitable giving refers to voluntary donations of money to entities outside the donor's family (Bekkers & Wiepking, 2011; Chapman et al., 2021). Charitable giving is a form of prosocial behavior that typically

involves three actors—a person who offers financial help (the donor), a person, animal, object, or group that receives help (the beneficiary), and a broker who solicits help from donors on behalf of beneficiaries (the fundraiser) (Chapman et al., 2021). The fundraiser may be an individual but is more commonly a nonprofit organization (Chapman et al., 2021). Charitable giving is a form of revenue source that can foster financial sustainability.

Many NPO leaders have expressed concerns about the financial sustainability and capacity of NPOs to meet the increased community needs (Biddle, 2020). The tension between resources and expectations challenges nonprofits in performing their desirable social functions in the community, especially in policy subsectors where direct government funding to nonprofits is limited, and they are expected to raise private capital to fund public services (Cheng & Yang, 2018). NPOs have been experiencing competition for resources and subsidy cutbacks, forcing them to give special attention to performance measures and achieve external goals to attract new resources (Modi & Sahi, 2021). In an evolving external environment characterized by reduced government support, declining government funding and donations, project-tied donor funding, and competition from for-profit organizations entering their space as a provider of welfare services, NPOs should develop a resource acquisition strategy based on the beneficiary needs and donor mapping (Modi & Sahi, 2021). Given the present challenges within the NPO industry, NPO leaders must continually enhance their knowledge and resources to push the organization forward.

NPO leaders' expertise, resources, and experience are often more relevant during disasters or emergencies (Sledge & Thomas, 2019). Beginning in 2007, the Great Recession caused a market and economic downturn. Private charitable giving fell from \$344.5 billion in 2007 to \$293.8 billion by 2009, with giving from living donors reducing by 11% from the 2007 high (Sprague, 2019). For-profit and nonprofit revenue opportunities experienced a steep drop during depressions and recessions. Events outside the control of NPO executives and leaders affect NPOs just like every other organization type (Beaton, 2020). Nonprofit managers require a clearer understanding of which strategies to implement in response to emerging challenges, public policies' impacts on their organizations' capabilities, or populations' increased demands for emergency aid and resources (Santos et al., 2020). Nonprofits and their leadership are not immune to the economic and financial crises of the social problems for which they provide relief services to society.

The COVID-19 pandemic had significant and pervasive implications for the finances and operations of organizations in the nonprofit sector (Yang, 2021). The COVID-19 pandemic drastically affected most nonprofits, with some unable to deliver their services and others struggling to find the resources to do so (Stühlinger & Hersberger-Langloh, 2021). Nonprofit management faced specific challenges arising from the immediate impacts of the COVID-19 pandemic (Santos & Laureano, 2021). Social problems, including those exacerbated by COVID-19, cannot be addressed by one organization; NPOs must work across their organizational or even sector boundaries toward solutions to complex and pressing social problems (Yang, 2021). Postpandemic

actions will require restoring or maintaining nonprofit organizations' capacity to provide services through fundraising and attracting and maintaining material and human resources because these organizations are currently struggling financially (Deitrick et al., 2020). NPO leaders are tasked with identifying strategies to return the organization to full capacity after a crisis.

Nonprofit organizations need assistance to return programs to their full capacity that were partially abandoned during the COVID-19 pandemic due to volunteers' absence or decreased donations (Santos & Laureano, 2021). Santos and Laureano (2021) further stated that public funding lines should be explicitly made available to the nonprofit sector. Smaller nonprofits are especially vulnerable because their web-based accountability practices are not yet well developed due to their stakeholders' number and power, as suggested by stakeholder theory (Dainelli et al., 2013). When working from home is the rule and e-commerce becomes a significant trend, the Internet becomes the main tool for fundraising and receiving donations (Santos & Laureano, 2021). Fundraising and charitable giving are the cornerstones of revenue sources for nonprofit organizations.

For nonprofit organizations and charities to survive and thrive, financial contributions (monetary donations) are the most important form of support that aims to breathe new life into the relationship between surplus funds and funding needs (Bin-Nashwan et al., 2022). Understandably, NPOs' operations require resources in the form of financial support, equipment, or volunteer labor to carry out their projects and programs (Abiddin et al., 2022). Receiving monetary donations is critical to nonprofit

organizations (NPOs) because it enables them to fund their charitable programs and legitimizes their existence (van Dijk et al., 2019). Nonprofit organizations have access to limited funding, which must finance multiple activities (Sarikaya & Ulrich Buhl, 2021). Many, although not all, NPOs secure at least some financial resources through donations or grants (Gee et al., 2023). There is much more uncertainty surrounding the flow of financial resources to NPOs because donations—a primary revenue stream—are somewhat transient and unreliable (Ranucci & Lee, 2019). As a result, the continuous flow of financial resources is typically not guaranteed for NPOs, and this unpredictability may increase the need to diversify sources of revenue (Gee et al., 2023).

Because donations are a major source of funding for NPOs (Blackwood et al., 2016), the organizations must, therefore, invest in fundraising activities (e.g., postal campaigns, personal requests, TV advertisements) to solicit the monies necessary to finance their mission-oriented services (Sarikaya & Ulrich Buhl, 2021). The actions by which fundraisers decide to raise money may determine their outcomes, and different fundraising actions signal different priorities or degrees of care for donors (Chapman et al., 2019). Understanding how to target potential donors and communicate with them most effectively is an essential task for nonprofit marketers and fundraisers (Chapman et al., 2022). Nonprofit leaders must identify the characteristics of fundraisers – whether individuals or organizations, through relationship building to enhance their fundraising success.

Nonprofit leaders in the United States say forming relationships with major donors is a central priority (Buteau et al., 2019). Individual donors, fundraisers, and

grant-givers provide the resources to enable other people to be supported; without these funds, NPOs cannot provide services to fulfill their social mission (Mitchell & Clark, 2022). Donors are motivated to engage with NPOs prosocially and are attracted to give to the organization through mission-based services and offerings. Nonprofits' positions within funding networks affect their status in the network and impact the behavior of both general donors and institutional grantmakers (Faulk et al., 2017).

Generalized social trust—a general propensity to trust unknown others—is argued to promote charitable giving when the donor cannot observe the direct distribution of funds or services to beneficiaries (Chapman et al., 2021). When the donor must trust the fundraising organization to follow through on their promises, giving is more likely among people who report high levels of social trust (Bekkers, 2003; Chapman et al., 2021). Trust in the fundraising organization is also argued to be essential in giving relationships (Chapman et al., 2021). Sargeant and Woodliffe (2007) theorized that trust in the specific nonprofit organization or charity is the critical determinant of whether or not a donation will be made and, if so, how much will be given. Nonprofit marketers and managers must not just identify donors with higher levels of generalized trust; they must also work hard to develop a relationship of trust with donors (Chapman et al., 2021). There are different funding methods that nonprofit leaders are afforded to explore to increase capital funding.

Nonprofit Funding Methods

Charitable giving is a method in which donors contribute to NPOs. Charitable giving is both triadic and relational. Giving is triadic because the characteristics of three

actors—donors, beneficiaries, and fundraisers—influence charitable decisions (Chapman et al., 2022). Chapman et al. (2022) further stated that giving is also relational because charitable choices are influenced by interactions between the characteristics of the three actors. Charity is a relatively subjective decision; in other words, believing that charity is a subjective decision licenses individuals to donate in personally gratifying ways at the cost of maximizing welfare (Berman et al., 2018). Charitable giving is a decision that donors make.

Donors are entities that voluntarily contribute money to beneficiaries or to organizations that serve beneficiaries (Chapman et al., 2022). Donors can include individuals, foundations, governments, and corporations (Chapman et al., 2022). Donors could contribute either to a specific charitable campaign or through regular and monthly contributions to a portfolio of campaigns (Salido-Andres et al., 2018). Donating by a potential donor entails the sacrifice of personal resources, whether money or time, which is frequently limited and, as such, could easily be put to a different use (Caserotti et al., 2019). Donors who make donations are one funding source for nonprofit organizations; there are others, such as grants.

Restructuring of funding allocation processes of federated fundraisers like the United Way has lessened the reliability of revenue streams (Heather, 2022). Receipt of government grants and contracts typically entails participation in an RFP process where nonprofits respond to government funder requests for proposals (McCaskill & Harrington, 2017). Heather (2022) stated that foundation grants are one source of funds nonprofits may consider to address budgetary gaps arising from these changes. Nonprofit

leaders' pursuit and receipt of government support in local grant economies may provide a positive signal to other potential funders (Heather, 2022). Nonprofit organization leaders manage funding sources, whether via grants or charitable donations.

Charitable donations constitute choices; donors' values influence the choice to donate and the selected nonprofit organization (van Dijk et al., 2019). Pursuing potential donors and stakeholders of the NPO may require campaigns and marketing strategies. As for donors, they pay attention to the presence of rational and credible appeals in the message of a campaign that affects their giving (Chen et al., 2019). Digital transformation disrupts how NPOs manage relationships with their stakeholders and donors when they harness resources, strive to achieve their missions or advocate for societal support (Mato-Santiso et al., 2021). NPO leaders can communicate with potential donors and stakeholders to obtain funding through effective campaigns and marketing strategies.

Campaign Strategies and Marketing to Stakeholders

When nonprofits, charities, or organizations launch capital campaigns, they hope to attract large amounts of resources in a relatively short period of time (Pierpont, 2011; Woronkowicz, 2018). Mitchell and Clark (2022) stated that what NPOs need to survive long-term is supporters and stakeholders who go beyond the transaction, are motivated by the mission, and believe in the NPO's ability to achieve the mission. NPOs' capacity to fulfill their mission increasingly depends on developing successful alliances with key external and internal stakeholders, including cooperative inter-organizational relationships (Álvarez-González et al., 2017). Managers should strive to develop an all-pervasive organizational focus on beneficiaries, donors, peers, and staff by regularly

gathering information on these stakeholders' changing needs and requirements and responding with solutions to address their needs (Modi & Sahi, 2021). NPO leaders must evaluate and adapt their relationship with stakeholders to remain engaged with this group.

There are direct benefits for nonprofit organizations that engage in impact measurement to reach stakeholders. Fundamentally, NPO's impact measurement differs from conventional performance measurement for businesses (Nicholls, 2018). Because NPOs do not have a profit-making objective, they cannot motivate performance and behaviors through financial measures (Yang, 2021). Yang (2021) further stated that measuring impact in terms of efficiency and profit is inappropriate for NPOs and their stakeholders. When faced with the demands of multiple stakeholders (principals) and multiple tasks to be performed, NPOs may choose to prioritize tasks that offer the greatest reward or utility (Stühlinger & Hersberger-Langloh, 2021). These tasks can include capital campaigns to gauge the impact nonprofit organizations can have on the community they serve.

Capital campaigns are large events that emphasize the need of a particular nonprofit ecology (e.g., through increased marketing); there is an expectation that the level of peripheral resources will increase as a result of a capital campaign due to donors' increased awareness of the need (Woronkowicz, 2018). Furthermore, Woronkowicz (2018) stated that as such, organizations that capture peripheral resources would be better off because of a capital campaign. Capital campaigns depend on large financial donations, and the efforts to capture the optimal donor rely on the organization's leaders deploying the capital campaign (Pierpont, 2011). On average, a campaign is associated

with a 5% increase in the level of contributions to nonprofit organizations in all sectors and subsectors (Woronkowicz, 2018). NPO leaders must address the challenge of managing a capital campaign deployment while engaging potential donors to contribute to the campaign.

Faced with declining numbers of individual donors and average contributions (Rooney et al., 2018), nonprofit organization leaders are confronted with growing competition for funding and a critical need for effective and efficient fundraising campaigns (Sneddon et al., 2020). Scholars have emphasized positive relations with nonprofit organization leaders' spending of money on fundraising campaigns and an increase in donation levels through advertising the organization's mission and accomplishments within the campaign (Woronkowicz, 2018). Woronkowicz (2018) stated that conversely, nonprofit organization leaders might amplify their efforts in fundraising as a competitive response to another organization pursuing a capital campaign. Most organizational studies cast social media as a positive force (Valentini, 2015) that can enhance, among other things, a nonprofit's communication, marketing, fundraising, stakeholder engagement, knowledge acquisition, awareness building, volunteer management, accountability, advocacy, and relationship-building activities (e.g., Campbell et al., 2014; Farrow & Yuan, 2011; Guo & Saxton, 2018; Svensson et al., 2015; Waters et al., 2009; Xu & Saxton, 2019). Marketing technologies and techniques help NPO leaders deploy capital campaigns.

Marketing Technologies and Techniques

Social media represents a new medium for stakeholder relationship building, offering a relatively low-cost option for interactive two-way communication with large and geographically dispersed audiences (Campbell et al., 2014; Maxwell & Carboni, 2016; Waters et al., 2009; Xu & Saxton, 2019). Nonprofit organizations widely use social media (Di Lauro et al., 2019). Waters et al. (2009) identified that nonprofit organizations use social media to streamline their management functions, interact with volunteers and donors, and educate others about their programs and services. The linchpin of any stakeholder engagement effort on social media is social capital or the resources that accrue from membership in a social network (Bourdieu, 1984; Lin, 1999; Xu & Saxton, 2019). Particularly, effectively implementing communication strategies, including the use of social media, enables nonprofit organizations to build trust and engage with stakeholders, increase donations, and retain dedicated donors (Jiwon et al., 2021). Thus, nonprofit social capital comprises the resources embedded in building strategic alliances and stakeholder relationships (Doerfel et al., 2017; Xu & Saxton, 2019). Relationship building is the responsibility of nonprofit organization leaders.

Relationship building—the social media investment—first leads to new and unique forms of social capital, which, in turn, must be expended, converted, or mobilized to deliver other useable resources or desired organizational outcomes (Xu & Saxton, 2019). Nonprofit organizations' success largely hinges on their ability to build quality relationships with key stakeholders such as donors, clients, grantmakers, grant seekers, and the public at large (Xu & Saxton, 2019). In the nonprofit sector, effective

communication with stakeholders is pivotal for promoting a good reputation, gaining financial resources, and, eventually, pursuing an organization's mission (Jiwon et al., 2021). The concept of stewardship is a set of rules dedicated to building and maintaining relationships with the organization's most important stakeholders (Kelly, 2001; Olinski & Szamrowski, 2022). Stewardship of relationships, whether via stakeholders, donors, or constituents, is important for nonprofit organization leaders.

Nonprofit organization leaders have used stewardship to emphasize the need to build and maintain relationships with stakeholders by using the proposed four strategies. Stewardship comprises four strategies: reciprocity, responsibility, reporting, and relationship nurturing (Olinski & Szamrowski, 2022). Reciprocity means that the organization explicitly expresses gratitude for a donation or other forms of contribution directed to a specific person to fulfill statutory organization goals (Olinski & Szamrowski, 2022). Kelly (2001) stated that responsibility means the organization's activities are carried out according to its mission, and reporting is how an organization emphasizes its financial credibility. Therefore, nonprofit organization leaders must review their stewardship activities to align with their mission to remain true to their aims.

Yoo and Drumwright (2018) identified that social presence—the sense of being there with others, interacting with them, and empathizing with their plight—is the psychological mechanism that closes the social and psychological distance between affluent potential donors and the beneficiaries of nonprofit fundraising. Many people view relying on subjective preferences as normatively appropriate when choosing where to donate, even when transparently more effective options are available to donors

(Berman et al., 2018). The role of the balance between the donor's perceived cost and the recipients' perceived benefit in predicting prosocial behaviors and subjective preferences (Caserotti et al., 2019). With an emphasis on self-expression associated with the decision of choice suggests that consumers (potential donors) seek information about the self-relevance (impact) of a potential donation when they consider whether to contribute to an NPO (Fajardo et al., 2018). NPO leaders can attract potential donors by learning their perceived preferences for donating to an organization.

Contextual factors such as the age of the nonprofit organization, the longevity of fundraising, cause type, location, and commitment of senior management, and even the economy and political environment can affect the level of donations as well as the cost of fundraising for NPO leaders (Nageswarakurukkal et al., 2020). Donors' choice of donation as a form of giving reveals their greater intrinsic motivation because no tangible benefit is received in return (Kim et al., 2021). When a potential donor feels a high affinity for a specific social cause (appeal), this is likely to increase their likelihood of supporting the organization, partly due to the intrinsic motivation the social cause (appeal) incites (Minguez & Sese, 2021). Such purposeful donations suggest durable relationships, stable charitable motives, and a true connection between the donor and the organization (van Dijk et al., 2019). In summation, nonprofit organization leaders should use marketing technology and techniques to foster awareness of the organization and as a tool to engage with potential donors.

Campaign Appeals

Charitable donations show that potential donors evaluate both the impact of helping and its cost when participating in donor appeals (Caserotti et al., 2019). Charities and NPO leaders stimulate empathy in the donor by using donation appeals through their fundraising and marketing communications (Kumar & Chakrabarti, 2021). NPO leaders strive to increase repeat giving by individuals and identify and retain givers who are more committed (Kim et al., 2021). A solicitation (appeal) to repeat donors should emphasize organization related information in an effort to maximize the donation amount (Fajardo et al., 2018). NPO leaders will need to determine the appropriate appeal for their organization.

Donor-related appeals are referred to as appeals that affect the donors' identity and focus on the donors' perceptions of the organization. If the goal of a particular fundraising attempt is primarily to engage new donors, donor-related appeals should be emphasized (Fajardo et al., 2018). A donor-related appeal can conceivably portray donor behavior such as that people who place a high importance on universalism-concern might donate to international aid charities that promote equality, justice, and protection of all people, whereas people who place a high importance on tradition may donate to the same charity because it is faith-based (Sneddon et al., 2020). Organization leaders attempting to influence individuals to sign up for a mailing list or follow them on social media may want to focus on donor-related appeals because these decisions emphasize choice rather than valuation (Fajardo et al., 2018). Donor-related appeals increase donation rates, while organization-related appeals increase donation amounts (Gee et al., 2023). When

weighing their appeal choices, nonprofit organization leaders must consider the advantages and disadvantages of each choice.

Organization-related appeals communicate the information necessary for an individual (potential donor) to estimate the possible impact of a donation (Fajardo et al., 2018). Furthermore, Fajardo et al. (2018) stated that the emphasis on donation impact associated with the decision of amount to contribute, along with the ability to have organization-related information readily available, could significantly influence the donor's perceptions of a donation's impact, suggesting that organization-related information influences the decision of donation amount. Fajardo et al. (2018) also found that using both donor-related information and organization-related information in a single donor solicitation or appeal may not be effective (Sneddon et al., 2020). Through effective community and donor awareness strategies, NPO leaders can facilitate donor- and organization-related information.

Community and Donor Awareness

NPOs need supporters who stay with them across different life stages and show commitment and loyalty to the brand despite the fierce competition for resources in this sector (Mitchell & Clark, 2022). Digital markets are growing rapidly in the marketplace of general offerings (goods and services), and this trend is the same in the donation market (Park & Rhee, 2019). Furthermore, Park and Rhee (2019) stated that this donation trend gives nonprofit organizations and individuals who seek to raise funds access to more potential donors without the constraints of time and physical distance and allows individual donors to search efficiently for information on donation opportunities,

promoting participation in donations. In effect, digital communication opportunities enable stronger customer (donor) involvement in the NPO, creating content to contribute to that communication (Mitchell & Clark, 2021). Content creation is the responsibility of NPO leaders.

Mitchell and Clark (2021) identified that employing a breadth of story formats demonstrates inherent digital storytelling capability and a determination to appeal to a wide range of audiences through the story construct. Through both the production and consumption components, storytelling represents how an individual consumption experience is transformed into a relationship experience, collective by nature (Pera & Viglia, 2016). A signature story is an intriguing, authentic, and involving narrative with a strategic message that enables an organization to grow by clarifying or enhancing its brand, customer relationships, organization, and/or business strategy (Aaker & Aaker, 2016). Furthermore, Aaker and Aaker (2016) stated that signature stories represent a critical asset that can be leveraged over time and provide inspiration and direction inside and outside the organization. NPO leaders can bolster their organizations' reputation and status within the community they serve by deploying engaging content.

Nonprofits in the network's core (i.e., that receive multiple grants or contributions from centralized foundations) will share high status, partly through their relationships with high-status funders and partly through their reputations (Faulk et al., 2017). Reputation, as an intangible asset with a significant effect on real value investment, can play a role in for-profit companies' ability to secure resources and in nonprofits' ability to attract donors and funds (Kim & Han, 2020). An NPO's high reputation has positively

impacted people's willingness to donate (Kim & Han., 2020). A nonprofit's reputation within an interpersonal social network positively influences donation decisions (Galaskiewicz & Wasserman, 1989), and organizations' relative embeddedness within networks is expected to signal greater legitimacy to potential funders, leading to greater organizational survival (Faulk et al., 2017; Hung & Hager, 2019). Using the nonprofit organization's reputable reputation to attract potential donors can be a valuable strategy for NPO leaders.

Nonprofit leaders must think strategically about the positive spin-offs that certain types of funding can produce by generating other types of funding and other valued resources like visibility in the community or partnerships (Kearns et al., 2014). NPOs play an important role in community development by assisting communities in developing their social, capital, and human resources; enhancing knowledge and skills; encouraging people to participate in activities; and acting as a link between communities and systems (Abiddin et al., 2022). Business and NPO partnerships can be conceptualized as complex systems that address social challenges that are mutually important for both partners by taking advantage of their combined resources and consistently trying to use each partner's particular strengths (Barroso-Méndez et al., 2020). Nonprofit organization leaders build and maintain legitimacy through activities such as enhancing organizational visibility, ensuring transparency and accountability for actions, and managing information disclosure (Long, 2016; Namisango et al., 2019). Nonprofit organizations are often linked via a common reputation within their industry or sector such that publicity

about one organization can spill over to affect how stakeholders view their peers (Grant & Potoski, 2015).

Enhancing community outreach and reputation comes from building a corporate image. To build a good corporate image and enhance customer loyalty in the long run, companies and organization leaders are strengthening their corporate social responsibility (CSR) activities related to their industries, the socially underprivileged, and the environment (Park & Rhee, 2019). Corporate social responsibility is a very promising way for organizations to improve their reputations (Lin-Hi & Blumberg, 2018). By embracing caring practices (building trust, showing mutual concern, promoting human flourishing and responsiveness to needs) and values in CSR, nonprofit organization leaders can meaningfully strengthen their community impact, particularly by privileging the relationships with, responsibilities to, and lived experiences of the numerous individuals that the nonprofit organizations serve (Formentin & Bortree, 2019). A potential donor's personality trait influences their donor's behavior and impacts donor decision-making (Kumar & Chakrabarti, 2021). Individual donor motivation to contribute to a charity/NPO, similar to consumer motivation to purchase, has been of long-term research interest (Kumar & Chakrabarti, 2021). Donor motivation and behaviors influence nonprofit organization leaders' ability to garner charitable donations and donors' support of a campaign.

Donor Motivation and Behaviors

Recent research on those who donate to charity (nonprofit organizations) projects has also provided empirical evidence for the significant effect of motivation on driving

donors' intention to fund the projects (Bagheri et al., 2019; Li et al., 2018). Therefore, understanding individuals' motivations to fund charities (nonprofit organizations) is critical for leaders to improve the number of people willing to support the projects and enhance their donations to the projects (Bagheri et al., 2019; Li et al., 2018). Most donors' intrinsic motivations influence donor behavior (Kumar & Chakrabarti, 2021). Intrinsic motivations enable donors to put effort and contributions into organizational projects without the presence of external rewards (Bagheri et al., 2019; Deci et al., 2017). NPO leaders' understanding of altruism can be of benefit to learning the behaviors and motivations of potential donors.

Altruism is a trait that measures the degree of an individual's inclination to act in the interests of others without the expectation of reward or positive reinforcement in return (Karra et al., 2006; Kumar & Chakrabarti, 2021) Jian and Shin (2015) supported the influential effect of altruism and highlighted the impact of a set of internal motives including value for the content and fun of the project on directing contributors (donors) to monetary contribute (donate) to charity (nonprofit organizations) projects (Bagheri et al., 2019). Gorczyca and Hartman (2017) also found the significant impact of individuals' intrinsic motivations on their attitude toward and intention to donate to charitable organizations (Bagheri et al., 2019). NPO leaders can communicate with potential donors to obtain funding through effective marketing campaign strategies.

Marketing Campaign Strategies

Nonprofit marketing profoundly distinguishes itself from corporate marketing; the NPO serves as an intermediary between the donor and the beneficiary (van Dijk et al.,

2019). Because nonprofit organization leaders continue to rely on donations for a large percentage of their funding, they must focus strategic attention on building organizational prestige and identification through a holistic marketing plan focusing on product and service offerings, promotions and advertisements, and endorsements that accomplish these objectives and therefore, help build identification (Peasley et al., 2018). Lovejoy and Saxton (2012) found that organization leaders use online tools to communicate with potential donors in three key ways to increase interaction and deepen online relationships: information-sharing, community building, and asking supporters of the organization to act on the organization's behalf. Online communication as a marketing method provides NPO leaders with a strategy to interact with potential donors.

Instead of pushing information out to followers (potential donors who are connected to the organization's social networks), nonprofit leaders should increase the depth of communication style over time to engage their public audience and encourage dialogue between the organization's management and the followers (potential donors) (Nelson, 2019). Lovejoy and Saxton (2012) proposed patterns that organization leaders can use for marketing and communication strategies should highlight the inclusion of the importance of developing online relationships rather than using social platforms to talk "at" potential donors and stakeholders (Nelson, 2019). When recruiting donors (and increasing donations), the first challenge is to frame the donation appeal in a way that attracts attention and induces people to read it rather than ignore it (especially in online appeals, which people are inundated with through email and website advertising)

(Pittarello & Kogut, 2022). Using online appeals can allow for a digital platform to generate digital donations and engagement.

Digital donors show distinct motivations and behaviors because of the increased use of technologically convergent portable devices with permanent access to the Internet (Salido-Andres et al., 2018). In the last decade, NPOs have begun to use social media technologies, such as Facebook, LinkedIn, YouTube, and Twitter, to post updates and photos, contact donors directly, and inspire them to support their operations (Nageswarakurukkal et al., 2020). Nageswarakurukkal et al. (2020) stated that in addition to using social media as a communication channel, NPOs have started adopting digital fund-raising schemes, such as Facebook Causes, GoFundMe, and Crowdrise. Despite having stagnant traditional philanthropic markets since the late 2000s (Blackbaud, 2018), the last five years (2018-2022) have been an opportune time to investigate the potential of online fundraising platforms as future charitable giving mechanisms (i.e., campaigns), given the relatively rapid growth in the online donation market (Shin & Choi, 2019). NPO leaders can engage and develop social capital with potential donors through an online community.

Launching a successful campaign can create an online community where internal social capital can develop (Cai et al., 2021). Social capital can center on the nature of nonprofit leaders' network positions with donors and their stakeholder ties (Xu & Saxton, 2019). Support for nonprofit organizations is critical to the care of the people that many nonprofits serve; thus, nonprofit leaders must be careful to design programs and marketing campaigns that increase the prestige of their organization to impact

identification and donation intentions (Peasley et al., 2018). Donations collected by NPOs are influenced by and proportional to the investment that NPO leaders make in fundraising campaigns, i.e., the higher the fundraising investment, the higher the donations collected (Nageswarakurukkal et al., 2020). In particular, when conducting a campaign, the targeting “when” a campaign appeal is sent is likely to be more fruitful than “to whom” a campaign appeal is sent (Kim et al., 2021). One marketing strategy that can provide relationship-building and connection for NPO leaders is relationship marketing.

Relationship marketing has been vital in developing stronger relationships and promoting donor continuity in nonprofit organizations (Minguez & Javier Sese, 2022). Relationship marketing has been postulated as an important approach through which marketing managers within nonprofit organizations can achieve customer and donor engagement and higher levels of loyalty (Beckers et al., 2018; Kim et al., 2021; Minguez & Javier Sese, 2022) as well as maintain or increase funds collected (Minguez & Javier Sese, 2022; Zogaj et al., 2021). Donor relationships enable NPO leaders to obtain required funds and in-kind donations and facilitate informing donors about the impact of their donations (Nageswarakurukkal et al., 2020). NPO leaders can stimulate donor self-perception within their marketing campaign strategies.

Nonprofit organization leaders can also focus on donors’ ideal self-concept (self-perception, which is how donors view themselves) as a marketing campaign. Zogaj et al. (2021) stated that nonprofit organization leaders should focus on donors’ ideal self-concept to strengthen the organization-donor tie. To accomplish this goal, nonprofit

organization leaders should examine donors' ideal self-concept, then create marketing campaigns to match donors' ideal self-concept and show donors that they can enhance their self-concept by donating (Zogaj et al., 2021). Nonprofit organization leaders matching potential donors' ideal self-concept positively affects competence belief, while aligning with potential donors' actual self-concept positively increases benevolence (financial giving) and integrity (belief) (Zogaj, 2022). Zogaj (2022) further stated that in addition, both competence belief and benevolence (financial giving) and integrity(belief) are of vital importance because both factors positively influence potential donors' attention to a social media post, which affects potential donors' behavioral outcomes.

NPO leaders should focus more on cost-efficient marketing strategies, which could improve the sustainability of the NPO's fundraising campaigns (Nageswarakurukkal et al., 2020). Traditionally, TV advertisement, direct mail, or telemarketing were the key tools in NPOs' communication activities, and since the 1990s, NPO leaders have employed new media platforms such as websites, text messages, and e-mails (Nageswarakurukkal et al., 2020). Currently, crowdfunding has emerged as a valuable alternative funding source; it differs from traditional financing methods because it lets fundraisers present their projects on a platform (Chen et al., 2019).

Crowdfunding is an umbrella term used to describe an increasingly widespread form of fundraising, typically via the Internet, whereby groups of people pool money, usually (very) small individual contributions, to support a particular goal (Ahlers et al., 2015).

For nonprofit organization leaders, crowdfunding presents novel donation behaviors, including those where donors may proactively seek out causes and give (often

anonymously) to help others with whom they share little social connectivity (Gleasure & Feller, 2016). In the donation crowdfunding model, the founder (nonprofit organization) receives money from a crowd (pool of people) without any tangible return for that contribution; no rewards are offered to contributors (donors), and the funds received are essentially a grant given for a specific purpose, but without the expectation of a particular return to the contributor (donor) (Paschen, 2017).

Donation-based crowdfunding has emerged from the broader field of crowdsourcing, which refers to a public appeal initiated through web-enabled information systems to make donations over a fixed time limit (Chen et al., 2019). As a distinctive problem-solving strategy and a widespread social practice, donation-based crowdfunding has become an alternative source of capital for various personal and public purposes (Xu, 2018). Interestingly, donation-based crowdfunding adds an online condition, which traditional crowdfunding does not (Chen et al., 2019). Furthermore, donation-based crowdfunding platform managers (nonprofit organization leaders) can present the number and amount of individuals, current and previous, that have supported the organization financially via crowdfunding to intrinsically inspire more donations to charitable organizations (i.e., nonprofit organization) crowdfunding projects and increase the probability of donation-based crowdfunding success (Ahlers et al., 2015; Bagheri et al., 2019; Karlan & List, 2007; Paschen, 2017; Wash, 2013). Additionally, NPO leaders can use online communication, relationship marketing, and crowdfunding to increase community awareness and capital funding.

Transition

The purpose of this qualitative single case study was to explore strategies that nonprofit organization leaders can use to increase community awareness and catalyze capital funding. In Section 1, I described the specific business problem and the primary purpose of my study. Section 1 also contained a critical analysis and synthesis of the literature that pertains to my chosen conceptual framework.

Section 2 of the study contains elements of the project, which include the role of the researcher, participants, research method and design, population and sampling, ethical considerations, data collection and analysis, reliability and validity indicators, and a summary section. In Section 2, I identified the mechanisms for safeguarding participants, confidentiality, protecting the partner organization, safekeeping of data, member checking, and compliance with the IRB approval in conducting my study. In Section 3, I used the Baldrige Performance Excellence Program (2021) and criteria to conduct in-depth semistructured interviews to understand the partner organization's leadership, strategy, recipients of their services, knowledge management, workforce, operations, and results.

Section 2: The Project

Purpose Statement

The purpose of this qualitative single case study was to explore strategies that nonprofit organization leaders use to increase community awareness to catalyze capital funding. The targeted population comprised three senior leaders from a single NPO located in the mid-Atlantic region of the United States who have implemented successful community awareness strategies, which led to increased capital funding donations.

Role of the Researcher

In this qualitative single case study, I served as the primary instrument for data collection. I collected data by conducting semistructured interviews with participants. I also collected and analyzed data and information in documents provided by my client leaders and public data, such as newsletters and the organization's website. Saunders et al. (2015) noted that interview questions need to be phrased clearly so that the interviewee can understand them, and the interviewer should ask them in a neutral tone of voice. Elmir et al. (2011) stated that demonstrating care and empathy during research is essential in eliciting information from participants. Ngozwana (2018) said that to learn how the participants interpret their lives and experiences; the researcher must be focused on the how instead of the what during an interview. Elmir et al. (2011) stated that creating a comfortable interview environment, environmental considerations, and venue appropriateness must be carefully thought through. Demonstrating certain qualities such as active listening, awareness, respect for each person, building trustful relationships, and being sensitive to ethical issues is essential in the role of the researcher (Ngozwana,

2018). I conducted my semistructured interviews and data collection process by being mindful of body language and the environment for the interviewee and demonstrating calmness through my tone of voice when asking questions.

As a researcher following the protocols of *The Belmont Report* (NCPHSBBR, 1979), I ensured that my participants fully understood their part in the study. Using the ethical principle of privacy ensured the confidentiality of the participants (Saunders et al., 2015). As the researcher, I was responsible for conducting my research ethically and establishing the ethical principle of responsibility with participants.

Given my current position, I have relationships with nonprofit organizations and capital funding. Within the executive leadership role in a nonprofit organization, I have the opportunity to experience first-hand the challenges and strategic foresight needed to manage capital funding. As a senior leadership team member, I could relate to my participants and adjust my semistructured interview strategy to create a conducive environment to foster rapport and trust with my participants. I used this experience and knowledge to perform my researcher role effectively. Prior to this study, I had no relationship with the leader of my assigned client organization or knowledge of the organization.

To accurately represent the phenomenon, the researcher must minimize biases. Researcher reflexivity, a researcher's insight into their biases and rationale for decision-making as the study progresses, is critical to rigor (Johnson et al., 2020). Biased research has been found to alter the results of a study, and it is considered a threat to the research's reliability (Saunders et al., 2015). In this study, I used in-depth, probing interview

questions, member checking of interview interpretation summaries, and data triangulation to minimize biases. Dodgson (2019) stated that minimizing biases expands one's consciousness to make what has been tacit explicit. Fusch and Ness (2015) defined triangulation as using multiple methods to collect and analyze data. Data triangulation is essential to achieve data quality.

Participants

Ngozwana (2018) asserted that participants in qualitative research are treated as coresearchers rather than subjects. The eligibility criteria I used included selecting senior leaders of the nonprofit organization that Consulting Capstone administrators selected as my research partner for this study. The Walden University IRB required each participant in the study to sign a consent form and voluntarily participate. The Walden University IRB participants' roles and responsibilities as senior leaders of the client organization include the following areas: (a) creating or enforcing the client organization's mission, vision, values, purpose, and core competencies, (b) workforce development and retention, (c) communication and interaction with customers, stakeholders, and partners, and (d) the ability to provide data and information for document review and analysis.

Participants in this study met the eligibility requirements. They were leaders of a nonprofit organization that successfully obtained funding for a nonprofit organization for a minimum of 5 years. A nonprofit organization leader who did not meet the minimum 5-year eligibility and criteria may have had insufficient knowledge to provide a strategic perspective on the strategies for success in obtaining funding. The eligibility criteria

aligned with the primary research question for this study, which is that NPO leaders increased community awareness to catalyze capital funding.

My plan for gaining access to participants included emailing and video conferencing the senior leaders of my identified nonprofit client organization. A working relationship with participants was an essential element of the research process. Trust, intimacy, and rapport are required to create a warm working environment needed for a participant and researcher to exchange information freely and for the researcher to collect rich data (Elmir et al., 2011; Morse, 2015). To establish a working relationship with participants, I first completed an introductory Zoom meeting (video conference) and email correspondence to explain the purpose of the study and the interview process and to answer questions. I also frequently visited the client organization's website to understand the nonprofit organization's mission and observe its operations.

During the interview process, the working relationship was fostered with open-ended questions, as open-ended questions allow a researcher to ask follow-up questions based on the participant's answer, leading to more discovery, mutual exchange, and better rapport (Chenail, 2011). Member checking, also called respondent validation, refers to checking with study respondents to see if the research aligns with their views (Busetto et al., 2020). If the participant felt that the material was not accurate, they could add information, provide clarification, or make corrections. Member checking is beneficial because researchers can achieve reliability and enhance validity in the doctoral research process (Morse, 2015).

Research Method and Design

The information in this component of my doctoral study expands on the information provided in the Nature of the Study section. I used semistructured video-conference interviews as the primary method to collect data for each participant. Furthermore, I reviewed organizational documents to collect information and data about how three senior leaders of a single nonprofit organization explored strategies to increase community awareness to catalyze funding from businesses, foundations, and individual donations.

Research Method

Qualitative, quantitative, and mixed methods are the three main research methods researchers use to conduct research (Creswell et al., 2007). The purpose of qualitative research is to provide an explanation, not merely a description and certainly not a prediction, which is the realm of quantitative research (Chandra & Shang, 2019). The qualitative research method involves an observer (a researcher) in the field who transforms the world into a series of representations such as field notes, interviews, conversations, photographs, recordings, and memos (Chandra & Shang, 2019; Denzin & Lincoln, 2011). The qualitative method allows for an in-depth understanding of NPO leaders' strategies to increase community awareness to catalyze capital funding, influencing the research results. Using a qualitative rather than a quantitative method for my study reflects my use of the most appropriate method to allow systematic collection and processing of research data.

The justification for using the qualitative research method over quantitative and mixed method research methods is as follows. Researchers have asserted that research methodology evolved from paradigms that make different assumptions about the world, research conduct, legitimacy of problems, solutions, and the criteria of proof (Firestone, 1987; Saunders et al., 2015). The methodology can impact the research and the doctoral study findings and results. Each research method type provides different information and can contribute to a reader's understanding of the subject of the study (Adams & McGuire, 2022; Firestone, 1987). Quantitative research is an approach for testing objective theories by examining the relationship among variables (Creswell et al., 2007). I was not examining relationships among variables; therefore, the quantitative research method was not appropriate for this study.

Furthermore, I did not integrate and measure data using statistical analysis and projections, which is appropriate for a quantitative researcher (Jones et al., 2019). Mixed methods combine quantitative and qualitative methods to produce a richer and more comprehensive understanding of a phenomenon (Jones et al., 2019). I did not bring quantitative and qualitative research methods together in this study; therefore, mixed methods were not appropriate for use in this study.

Research Design

The research design is the general plan of how the researcher will answer the research questions (Saunders et al., 2015). Case study research design includes five essential components: case study questions, the propositions, if any, the case(s), the logic linking the data to the propositions, and the criteria for interpreting the findings (Yin,

2018). Stake (2005) stated that case study research focuses on identifying a particular entity's characteristics and key distinguishable attributes, including a focus on a single unit, an in-depth description of a phenomenon anchored on real lived scenarios, and uses multiple data collection methods. A phenomenological research design study focuses on participants' lived experiences that the participant can recollect and interpret (Saunders et al., 2015). In this study, I am using a qualitative single case design.

A basic qualitative inquiry allows researchers to explore a phenomenon in depth within its context, relying on interviews with the participants to gain insights into the phenomenon being studied and the context in which it is situated (Merriam & Tisdell, 2016). Qualitative research design serves as a guideline that connects the interpretive paradigm and the strategies for investigation and data collection methods (Ngozwana, 2018). If a researcher can replicate an earlier research design and achieve the same findings, that research would be seen as being reliable (Saunders et al., 2015). To achieve reliability within the doctoral research process, the researcher must perform a study such that the same results can be obtained if repeated. Miller (2008) described reliability as the dependability, consistency, and repeatability of a project's data collection, interpretation, and analysis.

Case study research studies an issue explored through one or more cases within a bounded system over time through detailed, in-depth data collection involving multiple sources of information. (Creswell et al., 2007). Case studies are empirical investigations in that they are based on knowledge and experience, more practically speaking, involving data collection and analysis (Farquhar, 2012). This study was for one case, the partner

organization, an NPO in the mid-Atlantic region of the United States, to satisfy the design requirements of the Walden University DBA consulting capstone program (Walden University, 2021). Therefore, a qualitative single case study was the best design for my research.

I did not use other qualitative research designs, such as ethnography, phenomenology, or grounded theory, for my study. Ethnography is the study of people in naturally occurring settings or fields by means of methods that capture their social meanings and ordinary activities (Brewer, 2000). I did not use an ethnographic research design because the purpose of my research was not to study people in their natural occurring settings or fields nor to capture their social meanings and ordinary activities. The qualitative research method of phenomenology conducts research on a phenomenon (Khan, 2014). I did not use a phenomenological research design because I did not capture a common group understanding of the selected phenomenon. Grounded theory is defined as the discovery of a theory from data systematically obtained from social research (Glaser & Strauss, 2017). I did not use a grounded theory research method because I did not plan to develop a theory suited to its supposed use in this study. Therefore, my study did not employ the other qualitative research designs.

Yin (2018) provided a technical definition of case studies as an empirical inquiry investigating a contemporary phenomenon within its real-life context, especially when the boundaries between phenomenon and context are not evident. The use of the single case study design was most appropriate in this study instead of the multiple case study design. I used the single case study design because participating in the Walden University

consulting capstone limits my study to one client organization, not multiple organizations. Therefore, a single case study design will enable me to explore my client organization and achieve data saturation requirements.

Data saturation in qualitative research ensures an adequate sample size for the phenomenon studied. Data saturation is an important indicator that a sample is adequate for the phenomenon studied and that data collected have captured the diversity, depth, and nuances of the issues studied, thereby demonstrating content validity (Francis et al., 2010). It also ensures the determination of the final sample size for a qualitative study. Determination of the final sample size is largely based on having sufficient opportunity to collect relevant data until new information is no longer emerging from data collection, new coding is not feasible, and/or no new themes are emerging, which is reaching data saturation (Johnson et al., 2020). Researchers use data saturation in qualitative research to ensure accurate and valid data and as a common standard of rigor for data collection.

Population and Sampling

The target population for my doctoral study included three individuals from the senior leadership team and managers of my assigned client organization. The justification for targeting three individuals from the senior leadership team and managers is that the researcher chose the most appropriate participants to answer my research question. Identifying the place and people to participate in a study is done through sampling (Ngozwana, 2018). The sampling design in qualitative research is not random but is defined purposively to include the most appropriate participants in the most appropriate context for answering the research question (Johnson et al., 2020). The design of this

single qualitative case study research included a purposive sampling of the senior leaders from my client organization.

Purposive sampling involves intentionally selecting research participants to optimize data sources for answering the research question (Johnson et al., 2020). Aware that I needed at least three participants to collect a sufficient quantity of rich, thick data and information from my semistructured interviews, I applied purposive sampling to continue data collection until no new information emerged. Further, I needed to triangulate data and information; therefore, I needed multiple research participants to hear multiple points of view in response to the same questions. To gain access to my target population, I used internet-mediated access, including face-to-face interactions and different computing technologies. Johnson et al. (2020) defined member checking as a common standard of rigor and a practice to increase a study's credibility and confirmability that involves asking a research subject to agree that the researcher has captured the essence of what was said in an interview.

Within this study, I used a member-checking approach to validate any assumptions that surfaced during the data-collection process. Synthesizing the literature to identify key characteristics to reach data saturation includes no new data, no new themes, no new coding, and the ability to replicate the study, provided the researcher asks the same participants the same questions in the same timeframe. (Fusch & Ness, 2015). I used multiple rounds of semistructured interviews to reach data saturation and coded my qualitative data into themes to analyze the results and generalize findings.

Qualitative researchers use purposeful sampling and an iterative process that includes data collection, analysis, and interpretation to determine sample size. Data saturation refers to the point in data collection when no additional issues or insights are identified, and data begin to repeat so that further data collection is redundant, signifying that an adequate sample size is reached (Hennink & Kaiser, 2022). Study data will include (a) semistructured interviews with senior leaders; (b) public data, such as reports and websites; (c) organizational internal archival data, such as records, documents, and artifacts; and (d) literature, such as books, peer-reviewed articles, and other bodies of written knowledge that communicate substantive research findings about practices that are relevant to the topic. I used this iterative process until I achieved data saturation.

Ethical Research

As an independent scholar, each participant in my study gave written consent to participate in the work's data collection phase. All participants' identities are confidential through a systematic approach of coding for participants to mask their identity and masking their organization's name and geographic location to help ensure that the identity of my research participants and client organization remain confidential. I followed the Walden University IRB approval process and received IRB approval (approval number 08-11-22-1156590) before approaching the research participants. Participants were informed that they could withdraw from my study at any time without penalty and can be done by email correspondence or voice consideration with IRB included in the consent form (Appendix B). The participants of this study were not be afforded or offered incentives for participating in the study.

Qualitative researchers can protect the confidentiality of participants. The coding of participants I used was: “P1”, “P2”, and “P3” to mask the identity of my participants. Conducting qualitative research virtually allows scholars to study contexts while safeguarding participants and researchers (Roberts et al., 2021). In using virtual methods to conduct my research, I remained mindful of the ethical principle of privacy for my participants in this study.

Walden University IRB protocols required all participants in the study to sign a consent form as a condition of voluntary participation in the study. I treated each participant ethically while adhering to Walden University IRB requirements, which included following the guidelines for using preapproved data sources and tools. The Walden University IRB is responsible for ensuring that each student adheres to the ethical standards of the University, as well as the federal regulations of the United States.

Walden University leaders require each student to obtain IRB approval to protect the interest of human subjects and when collecting or analyzing data (Walden, 2021). Using the fundamental ethical principle of respect for persons will allow me the opportunity to engage with the target population. In qualitative case study research, the interviewer can be intrusive into the participant’s world rather than the reverse. Providing assurance to participants during the interview process can allow for a better interviewing experience. An assurance from the researcher that confidential information is not being shared should make interviewees more relaxed and open about the data they are willing to provide the researcher (Saunders et al., 2015). Another research protocol is to demonstrate care and compassion for participants. Elmir et al. (2011) stated that

demonstrating care and empathy during research is essential in eliciting participant information. Respect for persons includes treating individuals as autonomous agents (US Department of Health and Human Services, 2016). While these approaches will not be the ultimate approaches for ethical research, they will start me in the right direction while implementing other principles, protocols, and strategies.

As the researcher, I ethically considered the environment and ensured the confidentiality of the participants. I provided an environment that keeps the participants responsive and private. I conducted the virtual methods in an office consisting of just myself with a closed door and no access for the public to enter while conducting the semistructured interviews. As the researcher, I also established rapport with my participants. I sent email exchanges before virtual meetings to establish rapport with senior leadership and management members. Upon completing this doctoral study, I will store the data securely in an encrypted file for 5 years to protect the confidentiality of the participants and store physical documents in a locked safe. Agreement documents, including templates for the consent form, DBA Research Agreement, and Service Orders, are included in the Appendices and listed in the Table of Contents.

Data Collection Instruments

I served as the primary data collection instrument for the collection of data for this qualitative single-case study. Although there is an appropriate place in qualitative research for other data collection methods, a primary benefit of semistructured interviewing is that the interview has a focal point while still giving the researcher the autonomy to explore pertinent ideas that may come up in the course of the interview

(Adeoye-Olatunde & Olenik, 2021). Research scholars, authors, and practitioners of qualitative research, such as Yin (2018), have identified archival records, direct observation, documentation, interviews, or physical artifacts as primary resources for case study evidence. As the primary data collection instrument, I collected data with open-ended semistructured interviews using an interview protocol (see Appendix A) and from company documentation obtained from the partner NPO, such as capital campaign marketing materials, company policies and procedures, and audited financial statements. I also collected data from the IRS Form 990s and publicly available data from GuideStar, an online information service that reports data and information of nonprofit organizations in the United States.

Two senior leaders and one board member of the partner NPO were the participants in the semistructured interview process. The process included in-depth semistructured interviews through video conference calls using the Zoom application on a computer and recording the interviews using the Zoom record function. Specific best practice methods used in the sampling and data collection processes to increase the rigor and trustworthiness of qualitative research include a clear rationale for sampling design decisions, determination of data saturation, ethics in research design, member checking, prolonged engagement with and persistent observation of study participants, and triangulation of data sources (Johnson et al., 2020). Epistemological, social, and occupational biases may exist in the researcher's conduct and approach to the study. The researcher must acknowledge and approach the research with this understanding and attempt to mitigate the risk of biases. I used a reflexive journal to mitigate any bias and

enhance the validity and reliability of the study by using member checking, data triangulation, and other strategies to achieve data saturation.

Data Collection Technique

The Walden University IRB is responsible for ensuring that all Walden University research complies with the university's ethical standards and US federal regulations and must approve before participant recruitment, data collection, or dataset access (Walden University, 2021). I followed the Walden University IRB approval process and received IRB approval before conducting data collection. The approval allowed me to collect and analyze data from senior leader semistructured interviews, public data and literature, and internal site documents and data, according to the terms of the DBA Research Agreement and the preapproved data sources.

I collected data from semistructured interviews using an interview protocol (see Appendix A) and organization documentation obtained from the partner NPO, including Board of Directors meeting minutes, company policies and procedure manuals, audited financial statements, and Form 990s. I also collected publicly available data from various sources, including the GuideStar organization, an online information service reporting on nonprofit organizations in the United States. The semistructured interviews began with an introduction, followed by an opening statement, interview questions, and a closing statement. Before conducting the interviews, I sent emails to the participants to provide them with consent forms, background on the study, information on their rights to withdraw from the research at any point, and preparations they may have to make before participating in the interview, such as finding a location for the interview to minimize

distractions. I also sought permission to video record the interview as recommended by research scholars (Merriam & Tisdell, 2016; Yin, 2018).

The interviews were semistructured, beginning with a statement of the purpose of the research study, guidance on the interview process, and an opportunity for the participants to ask clarifying questions. I interviewed as many participants as needed to reach data saturation with a minimum of no less than Walden University's DBA requirement of three participants. Upon completing the introduction and answering any follow-up questions from the participants about the research, I informed the participants that I will start a video and audio recording of the interview. After receiving their consent, I used video and audio recordings of each interview to help capture the data accurately, as recommended by Merriam and Tisdell (2016). I followed an interview protocol consisting of open-ended questions and recording of the responses to enhance accuracy when interpreting the data. I asked follow-up questions as the opportunity arose to probe for clarity and additional information. The interviews ended with a closing statement; I asked the participants if they were willing to be contacted for member checking my interpretation of the interviews with a thank you to close the interviews. At the conclusion of the interview, I provided my contact information to each participant to reach out with any questions or concerns.

The participants participated in member checking to enhance the study's credibility by reviewing my interpretations of the responses and ensuring that I captured the essence of the interviews. Morse (2015) proposed strategies for ensuring validity prolonged engagement, persistent observation, and thick, rich description; negative case

analysis: peer review or debriefing; clarifying researcher bias; member checking; external audits; and triangulation. By member checking the interview interpretations, I am allowed to foster an understanding of and familiarity with the data provided by each participant. The interview protocol (see Appendix A) to assist and guide me through the interview process allowed me to certify that I consistently shared the same information with all participants.

An advantage of the semistructured interviews as a data collection technique includes gaining insight into the participant's perceptions and experiences. The interviewer is responsible for shaping the start of a conversation, explaining the research to the participant, establishing the credibility interview, and gaining consent and the interviewee's confidence (Patton, 2015; Saunders et al., 2015). Semistructured interviews that are structured to provide in-depth interview responses from participants are built through shaping the conversation to be conducive for all participants.

There are disadvantages present when conducting semistructured interviews. The criticality of trust and rapport between the researcher and participant determines the amount of information the participants may be willing to share. One of the most important elements of data collection during an in-depth interview on a sensitive topic is the ability of the researcher to develop a rapport with participants (Elmir et al., 2011). An interview is the art of inviting the participant to provide as much information as possible for the study (Walden University, LLC, 2021); I established rapport and trust to ensure that participants provided rich, thick data and information.

Data Organization Techniques

Qualitative research has traditionally been represented as an approach requiring long periods of time for data collection and analysis (Vindrola-Padros & Johnson, 2020). Case study research focuses on digging out the characteristics of a particular entity and its key distinguishable attributes, including a focus on a single unit, an in-depth description of a phenomenon anchored on real lived scenarios, and uses multiple data collection methods (Stake, 2005). I used a reflexive journal to track data and document my feelings and reactions while conducting the research.

Researchers have also developed techniques to reduce the time required for qualitative data collection and analysis; techniques might entail reducing the time required to transcribe interviews or combining data analysis methods with data collection to deliver real-time findings (Vindrola-Padros & Johnson, 2020). I captured and organized the data by category and theme to structure a depository for ease of searching, retrieval, and data analysis. I secured and stored the research data in a locked safe in my business office. I saved electronic data and recorded the interviews in an electronic folder on a removable disk. I will retain all nonelectronic and electronic information in a secured safe for five years. Five years after the publication of my study, I will electronically destroy the removable disk and shred any physical documents.

Data Analysis

Qualitative research depends on the interaction between data collection and data analysis to allow meanings to be explored and clarified (Saunders et al., 2015). The precise ways researchers name their codes are intimately related to their research

questions and the procedures they adopt to generate their codes (Elliott, 2018). Elliott (2018) stated that incorporating naming in your data analysis could help convey the content's meaning and essence to the reader. Counting may also provide a useful indicator of the importance of a given code (Elliott, 2018). Counting the codes can help the researchers identify how widespread a code is among the data (Saunders et al., 2015). I used counting of codes and mapping my data to analyze the results. Indexing or mapping data to provide an overview of disparate data allows the researcher to understand the coding of their research questions (Elliott, 2018).

The thematic analysis involves a researcher coding their qualitative data to identify themes or patterns for further analysis related to their research question (Saunders et al., 2015). I will identify common themes and patterns after collecting my data using the thematic analysis approach. The essential purpose of a thematic analysis approach is to search for themes or patterns that occur across data, such as a series of interviews, observations, documents, or websites (Saunders et al., 2015). Once those patterns have been identified, Yin's (2018) pattern-matching technique can be included in my study as an additional data analysis process. Yin (2018) presented the pattern-matching logic technique, which focuses on the processes and outcomes in a given case study and serves as one way of initially casting the "hows" and "whys" of the study. I will use Excel spreadsheets to conduct the matching logic technique.

I applied data triangulation to the collected data. Triangulation is applying and combining several research methodologies to study the same phenomenon (Denzin & Lincoln, 2011). Implying triangulation combines two or more methodological

approaches, theoretical perspectives, data sources, investigators, and analysis methods to study the same phenomenon (Hussein, 2009). Triangulation is an appropriate process to analyze collected data because it allows a researcher to obtain a more comprehensive picture of data from multiple sources of data such as observations, interviews, and private or public documents than by using only data from one source of evidence (Merriam & Tisdell, 2016; Yin, 2018). Triangulation ensures the completeness and consistency of data collected and confirms the research findings (Earnest, 2020). Utilizing triangulation within the data collection process can increase my study's credibility.

Reliability and Validity

The criteria of reliability and validity are intended to make qualitative research rigorous (Morse, 2015). Reliability makes replication possible, although qualitative researchers recognize induction is difficult (or even impossible) to maintain with replication (Morse, 2008). Reliability of a measure is established by testing for consistency and stability (Bougie & Sekaran, 2019). If analysis protocols are detailed, rich, and descriptive, reliability checks and balances will be conducted during verification during concurrent data collection and analysis (Morse, 2015). Morse (2015) states that reliable studies are stable and not subject to random variation; the major strategies to ensure reliability are developing a coding system and inter-coder agreement. Other strategies for reliability include member checks and peer review debriefing, triangulation, and external audits (Miller, 2008).

Validity is dependent on the purpose and context of the research and refers to conclusions that are based on particular methods used to address validity threats that are

pertinent to the particular research (FitzPatrick, 2019). Qualitative research allows the researcher to address the fundamental measures of validity in qualitative research, such as rigor, the credibility of findings, conformability, trustworthiness, and acceptability (Sebele-Mpofu, 2020). Validity (or internal validity) is usually defined as the degree to which inferences made in a study are accurate and well-founded (Polit & Beck, 2012). Miller (2008) further defined it as the goodness or soundness of a study. Validity makes qualitative theories generalizable and applicable when recontextualized and applied to other settings (Morse, 2015).

Reliability

Qualitative research reliability refers to the results of a study being reproduced under a similar methodology while following a number of verification strategies in the course of the research process. Reliability refers to the consistency of a measure of a concept to include verification strategies within the research process (Bryman, 2016). The most critical components for evaluating the quality of a quantitative or qualitative research study include credibility (internal validity), transferability (external validity or generalizability), dependability (reliability), and confirmability (objectivity) (Morse, 2015). Reliability and validity assess the quality of research, which is of grave importance to my doctoral study research. Guba and Lincoln (1989) proposed four strategies: credibility, transferability, dependability, and confirmability. Creswell (2012) noted that qualitative researchers should use at least two strategies in any study.

When a researcher can replicate an earlier research design and achieve the same findings, that research protocol would be considered reliable by those who are assessing

the research (Saunders et al., 2015). To achieve reliability within the doctoral research process, the researcher must perform a study where the same results can be obtained if repeated. Miller (2008) described reliability as the dependability, consistency, and repeatability of a project's data collection, interpretation, and analysis. Qualitative research reliability refers to the dependability of the research design, method, and findings (Abdalla et al., 2018).

Dependability (i.e., reliability) is attainable through credibility, the use of overlapping methods (triangulation), stepwise replication (splitting data and duplicating the analysis), and the use of an inquiry audit or audit trail (Abdalla et al., 2018; Morse, 2015). I used member checking and an interview protocol to enhance the dependability of this research. Dependability is assessed using verification strategies such as an audit trail and multiple coders (Singh et al., 2021). Furthermore, dependability is the ability to obtain the same results if the study were to be repeated (Morse, 2015). To establish an audit trail, I explicitly described my research processes and outlined the steps described in my research method and design section. Additionally, I enhanced my research dependability by including tables showcasing the theoretical derivation of my identified coding themes and the results.

Validity

Validity refers to the appropriateness of the measures used, the accuracy of the analysis of the results, and the generalizability of the findings (Saunders et al., 2015). To achieve validity, as the researcher, I measured the phenomenon being studied and if its intended purpose was appropriate within the study. Morse (2015) proposed strategies for

ensuring validity: prolonged engagement, persistent observation, and thick, rich description; negative case analysis, peer review, or debriefing; clarifying researcher bias; member checking, external audits, and triangulation. The use of these strategies within my doctoral research process proved helpful in achieving validity. I used member checking and methodological triangulation to ensure credibility in this study.

Credibility

Credibility (i.e., internal validity) in qualitative research is prolonged engagement, persistent observation, triangulation, peer debriefing, negative case analysis, referential adequacy, and member checks (process and terminal) (Morse, 2015). Guba and Lincoln (1989) recommend member checking to enhance rigor in qualitative research, proposing that credibility is inherent in the accurate descriptions or interpretations of phenomena. I used member checking and methodological triangulation to ensure credibility in this study. Methodological triangulation involves using more than one method to study a phenomenon; it is beneficial in confirming findings, more comprehensive data, increasing validity, and enhancing understanding of studied phenomena (Bekhet & Zauszniewski, 2012).

Transferability

Transferability (external validity or generalizability) is a thick description essential in transferring the original findings to another context or individuals (Morse, 2015). Transferability provides detailed contextual information such that readers can determine whether the findings from the study are applicable, comparable, generalized, or can be transferred to their or other settings and situations. Transferability touches on the

degree of likelihood that certain findings will emerge in other similar contexts while retaining the meanings detected (Berkovich & Grinshtain, 2021). I used an interview protocol and continued data collection until no new information emerged to ensure data saturation and present a rich and complete context of the study so that future readers and researchers can judge the transferability of the results of this study to other contexts.

Confirmability

Confirmability is obtained using triangulation strategies and the audit trail (Morse, 2015). Researchers enhanced confirmability in qualitative research by confirming that the data collected accurately reflects the participants' viewpoints (Abdalla et al., 2018). Member checking, a common standard of rigor, is a practice to increase a study's credibility and confirmability that involves asking a research subject to verify the transcription of an interview (Johnson et al., 2020). Triangulation can be applied as a method to investigate data derived by different methods or from different sources; it enables consideration of those data from different angles or perspectives (Laumann, 2020). I used member checking and triangulation of the data collected during the participants' semistructured interviews, publicly available documents, and documents provided by the partner organization to ensure confirmability.

Data Saturation

Data saturation is imperative to ensure the study is credible and confirmable. Researchers must ensure they have achieved data saturation or risk their study's quality and calling into question validity. Determination of the final step of qualitative research is based on having sufficient opportunity to collect relevant data until new information is no

longer emerging from data collection, new coding is not feasible, and no new themes are emerging. Reaching data saturation is a common standard of rigor for data collection in qualitative studies (Johnson et al., 2020). I continued to interview other participants until I reached data saturation.

Transition and Summary

In Section 2, I provided the research method and design I used to help ensure the reliability and validity of my research findings. I presented the study's purpose and described protocols related to the role of the researcher; research participants; research method and design; depiction of the population and sampling; ethical research; data collection instruments and techniques, data organization techniques, data analysis; and reliability of the study and validity of the study. The study includes human participants; therefore, I identified the methods I used to ensure the ethical treatment of human participants as provided within the IRB approval, including consent forms, service orders, masking the identities of participants and subjects, member checking, and data storage and retention requirements.

In Section 3, I will describe using the 2021-2022 Baldrige framework (2021) and criteria to analyze the business environment of my client NPO. I employed the interview questions from Section 1 to collect data for this qualitative single-case study. I used the Baldrige criteria and organizational profile from the Baldrige Performance Excellence Program (2021) to evaluate my client organization's strengths and opportunities for improvement. I explored my client organization's (a) senior leadership, (b) strategies, (c) customers/recipients, (d) measurements, analysis, and knowledge management, (e)

workforce, (f) operations, and (g) results. I will begin Section 3 with a brief introduction of the study, information on the Baldrige Performance Excellence Program (2021), and the Walden Consulting Capstone. I will then present my client organization's key factors worksheet; the leadership triad of leadership, strategy, and customers/recipients; the results triad of the workforce, operations, and results; collection, analysis, and knowledge management; and finally conclude with an executive summary of key themes identified through data analyses, an overview of the project, and contributions and recommendations for future research.

Section 3: Organizational Profile

The client MWO (pseudonym), an NPO located in the mid-Atlantic region of the United States, was identified and assigned by the Walden University doctoral consulting capstone administrators and faculty from the larger population of NPOs in the United States. A Walden University doctoral consulting capstone study must address applied research linking theory to professional practice, and the purpose of this study was to explore strategies NPO leaders employ to build relationships with external stakeholders and the organization's ability to increase community awareness to achieve catalyzing capital funding objectives more effectively. I served as the primary instrument of data collection for the qualitative single case study and conducted the study following the Walden DBA Consulting Capstone Doctoral Study rubric and research handbook (Walden University, 2021), the Walden consulting capstone manual (Walden University, 2021), and the IRB.

I used the Baldrige Performance Excellence Program (2021) as a tool to conduct a holistic systems-based assessment of MWO's processes and performance outcomes. I ensured that Section 3 of the study and the Baldrige Performance Excellence Program (2021) were aligned and congruent with Walden University (2021). I conducted a thematic analysis of the data and identified three major themes: (a) stakeholder identification, (b) stakeholder needs and strategic performance targets, and (c) stakeholder and strategic planning. The themes revealed three key thematic findings from this study. The first thematic finding is that nonprofit organization leaders identify stakeholder partnerships to cultivate, leverage, and increase community awareness. The

second thematic finding is that nonprofit organization leaders develop and execute strategic performance targets based on identified stakeholders' needs and strategic objectives. The third thematic finding is that nonprofit organization leaders identify stakeholder groups to grow and diversify organizational revenue for financial sustainability. I exposed these three thematic findings while exploring my nonprofit client organization located in the mid-Atlantic region of the United States that pursued strategic objectives aligned with these three themes. I analyze these themes further subsequently.

Key Factors Worksheet

Organizational Description

The client, MWO, is a 501(c)(3) organization incorporated in the mid-Atlantic region of the United States in 1975 and classed as an NPO with primarily Food Agriculture and Nutrition charitable activities under the National Taxonomy of Exempt Entities code and within the Food Agriculture and Nutrition subject area of the GuideStar by Candid Philanthropy Classification System. MWO was established to provide quality meals and nutrition services to as many vulnerable and needy homebound as possible through noon meals, supper service, and liquid nutritional supplements. The founders founded MWO to serve homebound people of all ages and incomes.

MWO is one of the 688,672 IRS-registered 501(c)(3)s in the mid-Atlantic region of the United States. The IRS defines a 501(c)(3) organization under section 501(c)(3) of Title 26 of the United States Code. Under the IRS 501(c) code, there are two types of nonprofit organizations in the United States exempt from federal income tax; a 501(c)(3) is either a private foundation receiving most of its income from investments and

endowments or not a private foundation, receiving a substantial part of its income directly or indirectly, from the public or the government. In 2021, 88% of MWO's total revenue originated from individual and public donations, nongovernment grants, gifts, and contributions. MWO employed a competent executive director and engaged volunteers to log 28,000-plus volunteer hours, drove 195,950 miles to deliver 122,820 hot meals, 4,250 box meals, and 2,110 cans of a supplemental nutritious meal program.

Organizational Environment

Leaders of successful organizations have an in-depth understanding of their environment and are constantly observing opportunities and threats as they emerge. Leadership support is a key factor for the success of an organization's environment transformation (do Adro & Leitão, 2020). The organization's environment presents opportunities, which are ways of taking advantage of conditions to become competitive, and threats are environmental conditions that affect the achievement of the organization's strategic objectives (Dyer et al., 2020). The organizational environment component of the key factors worksheet includes an appraisal of the organization's product offerings, mission, vision, values, workforce profile, assets, and regulatory environment.

Product Offerings. MWO aspires to serve the community by providing quality meals and nutrition services to benefit seniors, people with disabilities, and those with diseases or illnesses who are vulnerable and homebound in their operational areas (Table 2). MWO provided the programs and services captured in Table 2 in 2023.

Table 2*MWO Programs and Services*

Program or Service	Description
Lunch Programs	Five days a week (and on most weekday holidays), we deliver a balanced, nutritious lunch to our neighbors who struggle to prepare an appropriate meal for themselves. Volunteers deliver meals – in their own vehicles and at their own expense. Meals can be delivered on an emergency-, short-, or long-term basis. Our meals are prepared fresh daily, never frozen, and generally consist of an entree, vegetable, salad or fruit, bread, beverage, and often dessert. A registered dietitian reviews menus. Each meal is heart-healthy and diabetic-friendly, and special dietary needs are met when possible.
Supper Services/ Saturday Meals	When medically indicated, a cold supper meal is delivered along with lunch to be consumed for the evening meal.
Nutritional Supplements	Nutritional supplements (Ensure or similar products) are provided to individuals who meet specific needs/criteria with a physician’s prescription.
Animeals	Is service available to current recipients because, during our regular home visits, we learned that some of our clients were sharing meals with their pets. They simply could not afford to purchase pet food. Research clearly supports the health benefits to seniors and the homebound from having a companion animal. We did not want our meal recipients to have to make a decision between feeding themselves and feeding their precious pets. The ANIMEALS program was developed in response to this need. We solicit donations of pet food from individuals in the community, supported by and collected at the local veterinary clinics and animal hospitals. No monetary donations are accepted for this program. Pets of meal recipients are provided with a monthly supplemental delivery of food through these donations.

MWO leaders, staff, and volunteers provide delivery services for their product offerings. The product offerings serve people who need prepared meals due to permanent or temporary disabilities. MWO delivery services are conducted by volunteers who provide a reassuring “check-in” to those who live alone or shut in. If a volunteer receives an unanswered delivery, this is reported to MWO and investigated by the leadership and staff. If there are any changes to a meal recipient’s health or needs, the staff of MWO follows up on these requests.

MWO leadership has worked to expand product offerings and pick-up location options to include transporting products from the preparation area for pickup closer to

their intended final destinations. By expanding product offerings, pick-up locations have allowed volunteers to spend less time getting started and more time out delivering the products. Through such logistical mechanisms and processes, MWO leadership, staff, and volunteers deliver their product offerings in service to their mission, vision, and values.

Mission, Vision, and Values. MWO's stated mission is to address the hunger, isolation, and unique needs of the homebound. Driven by volunteers who embody compassionate care, MWO strengthens their community by delivering hot, nutritious meals, friendly visits, and safety checks, thus empowering people to live valued, independent lives at home. The vision is for a mid-Atlantic area where the homebound live nourished and valued lives. In the mid-Atlantic region of the United States, 19.38% of the population in MWO's region is 65 or older, and 9.71% of MWO's population under 65 are living with a disability. MWO values the opportunity to nourish the needs of those within this demographic and serve their community.

MWO advances its mission with the opportunity to raise funding for its endowment to ensure funding for meals that nourish the needs within its community. MWO reinforces this conviction by fostering an organizational culture of teamwork and stewardship of partnerships with organizations, volunteers, and community leaders. In pursuing its mission, MWO values the strategic approach of no government funding for the organization. This allows the organization to adapt quickly to changing circumstances without bureaucratic delays and see all ages and income levels. Consequently, the community of all ages and income levels benefits from MWO's program and service offerings.

Workforce Profile. MWO employs an executive director to manage and oversee the organization's day-to-day operations. The executive director is also responsible for managing the relationship with the board of directors and volunteers to execute MWO's organizational initiatives and objections. The organization heavily relies on volunteers, including community members, youth leaders, and other professionals who volunteer time and expertise to support the delivery of MWO's programs and services to their recipients. MWO also employs 13 internal staff (personnel) who work daily alongside the volunteers. The core competencies of the 13 internal staff are initiated with an evaluation of the current skillsets. The results from the evaluation are used to determine areas of opportunity for each team member to become better within their role. The core competencies have been created for each position to depict MWO's expectations and create an environment of consistent improvement amongst all levels and positions.

MWO has created a workforce that embodies a cultural fit of individuals who can connect with the recipients the organization serves. The organization has aligned a workforce of individuals who approach their daily tasks empathetically and have a mission-orientated mindset. MWO communicates to its workforce through newsletters, face-to-face conversations, video tutorials, and social media posts. The portion of the workforce categorized as volunteers is unpaid so that the organization will express its appreciation through its social media post acknowledgments, newsletter shoutouts, thank you cards, and appreciation dinners.

Assets. MWO possesses assets to conduct organizational objectives and operations. Assets include but are not limited to cash and cash equivalents, investments,

pledges receivables, land, buildings, equipment, intangible assets (people, experts, information technology infrastructure, related hardware), prepaid expenses, and deferred charges.

MWO presented in its 2021 IRS form 990 filing total assets of \$5,260,000 comprised of \$551,000 cash and cash equivalents, \$4,607,000 investments, \$39,000 pledges and accounts receivable, \$9,000 prepaid expenses, \$54,000 land, buildings, and equipment. MWO owns a building and equipment, including desktop and laptop computers, printers, scanners, and office equipment to be used to conduct its program initiatives. Intangible assets include human capital and partnerships with other organizations and institutions. MWO human capital assets include a workforce composed of youth and community volunteers, skilled service providers, and resources from partner organizations.

Regulatory Requirements. MWO is a registered 501(c)(3) public charity as categorized by the Internal Revenue Services (IRS) Bureau, one of the 29 types of 501 (c) nonprofit organizations in the United States. Organizations that are exempt from federal income tax and are classified as a private foundation, receiving most of their income from investments and endowments, or not a private foundation, receiving a substantial part of their income directly or indirectly from the general public or the government, are required to file an IRS Form 990 or 990-EZ. MWO is one of the 688,672 nonprofit 501(c)(3) organizations in the mid-Atlantic region of the United States registered with the IRS. MWO has established a board of directors and created written board-approved policies

and procedures for document retention and destruction, whistleblowers and retaliation, conflict of interest, and a code of ethics.

To adhere to the requirements of accuracy with financial reporting and compliance with federal and state regulations, the MWO executive director engages in an annual financial statement audit by an independent auditing firm and shares the audit report, including audited financial statements and tax forms, with the board of directors. MWO has board-approved handbooks, a code of conduct, and training manuals published and communicated organization-wide to promote adherence to workforce compliance. MWO leaders comply with all state and federal labor laws. Any meeting, engagement, and communication amongst the board of directors or any committee authorized to act in its capacity are contemporaneously documented and recorded. MWO safeguards extensive records, including information about its operations, financials, recipient demographics, services and programs administered, stakeholders, and social necessity within its internal network, protected by an organization-owned firewall.

Organizational Relationships

Organizational Structure. Assessing and summarizing the organizational relationships of MWO starts with reviewing the organizational structure and governance. The organizational and governance structure of MWO is that of a typical nonprofit organization, beginning with the governing body identified as the board of directors comprising seventeen independent voting members and an executive director. The board of directors is tasked with governing and overseeing the organization's operations

(Luciano et al., 2020). No board of directors member receives any compensation for time and services rendered to MWO, and all board members contribute financially to MWO.

Each board member is allotted a term of 3 years and may serve up to two terms consecutively. The board manages the executive director's annual performance reviews and authorizes regulatory, statutory, and submission of tax filings. Over the past 5 years, the executive director and the board have engaged in an inclusive board member recruitment process, resulting in diverse thought and leadership. The organization's volunteers supply labor and skillsets to supplement the organization's capacity. MWO leaders are equipped with the resources via internal staff and volunteers to respond to organizational service needs and fulfill the organization's mission.

Customers and Stakeholders. Because of their high dependence on external environments (namely funds and legitimacy), recent economic and social changes, and their engagement with stakeholders (clients and families), NPOs must be aware of organizational innovation (do Adro & Leitão, 2020; Shin & Choi, 2019). MWO leadership has customers (recipients) and stakeholders who receive or make contributions to the organization's program services. The qualifications of customers of MWO include being homebound (physical issues the customer is dealing with), unable to prepare food for themselves, or not having someone available to prepare the food for them. Another requirement to qualify for services includes living in the service area. MWO interviews each customer (recipient) before services are rendered. The interviews are meant to gauge the customer's (recipients) needs and learn pertinent information to help staff and volunteers provide the most efficient service offerings.

The purpose of this qualitative doctoral capstone case study was to explore the strategies some NPO leaders employ to build relationships with external stakeholders and the organization's ability to increase community awareness to achieve catalyzing capital funding objectives more effectively. Stakeholder theory propounds that stakeholders are vital to the organization, and leaders of the organization must identify how to manage the needs of stakeholders concordant with the objectives, goals, and mission of the organization. In the customers and stakeholders component of the organizational profile, I explored MWO's strategic approach to customers (recipients) and stakeholders in alignment with the purpose of the study. The leaders of MWO value customers (recipients) and stakeholders and have built meaningful and mutually beneficial relationships.

Suppliers and Partners. MWO's suppliers and partners are critical external stakeholders to perform day-to-day operations. Partners of the organization include volunteers, mission-oriented partners, vendors, service providers, suppliers, partnerships with a local hospital in the mid-Atlantic region of the United States, and the community that MWO serves. These partnerships are critical for MWO's success because they provide operational support and collaboration with MWO to deliver program and service offerings to the community they serve. MWO has implemented a process for volunteer partners to provide customers with the best-in-class service and help efficiently deliver service offerings.

MWO's suppliers provide products and services to support the organization's operations. The suppliers comprise MWO's supply chain by offering expertise, materials,

equipment, grocery, food safety compliance, compliance training, safety delivery training, accounting services, technology services, and other services and products. MWO's suppliers include workers, trainers, food suppliers, nutritionists, transportation providers, donors, and volunteers. MWO's use of suppliers allows the organization to have a cost structure that is significantly better by using the suppliers' facilities and software to provide programs and service offerings to customers and stakeholders. MWO's due diligence of suppliers is based on their donations through time or money and their involvement with the organization's mission-driven service offerings.

Organizational Situation

Competitive Environment

A competitive environment is the basis for timely response to changes in the market and the driver of its development (Natorina, 2022). The competitive environment of a market or industry determines the level of success an organization can achieve within its respective industry. Management, in fact, requires an organization leader to measure and analyze an organization's performance, both inside the organization and in its competitive environment (Baldrige Performance Excellence Program, 2021). Porter introduced his five forces framework in 1979, revolutionizing how managers and entrepreneurs analyze their industry's competitive environment by examining specific forces driving industrial competition (Isabelle et al., 2020). If leaders can understand and implement the five forces of the competitive environment, this may allow the development of strategies to enhance their organization's financial sustainability and long-term viability.

Leaders of NPOs must keep a consistent pulse of competitiveness and develop a strategy to remain competitive. Competitiveness comes through innovation; when competitors are sluggish to respond, innovation provides a competitive edge (Iswan & Kihara, 2022). Nonprofit leaders can implement a business strategy that fosters innovation to offer the best-in-class service offerings to customers (recipients) and stakeholders to achieve competitiveness. An effective leader is needed in today's dynamic, complicated, and uncertain business competition climate, which can contribute significantly to the organization's survival, success, and expansion (Herlina et al., 2021; Li et al., 2020). Leaders of nonprofits are tasked with having the leadership skillsets to navigate a competitive environment and exemplify resiliency effectively.

Competitive Position. MWO is one of the 688,672 IRS-registered 501(c)(3)s in the mid-Atlantic region of the United States. A 501(c)(3) public charity is either a private foundation receiving most of its income from investments or endowments or not a private foundation receiving a substantial part of its income directly or indirectly from the public or the government and required to file an IRS 990 or 990-EZ. MWO is categorized as not a private foundation and receives funding from recipients, donors, and public sponsorship. Traditional nonprofit organizations (NPOs) are being affected by the reduction of private donations and government funding and are facing an increasingly competitive business environment in the modern era (Dart, 2004; Ko & Liu, 2021; Liu et al., 2015; Toepler, 2006). Strategic positioning by leaders of NPOs within their competitive environment is a significant determinant to achieving success in increasing community awareness and catalyzing capital funding.

MWO operates in communities along the mid-Atlantic region of the United States, positioned to embody compassionate care by strengthening the mid-Atlantic region communities by delivering hot, nutritious meals, friendly visits, and safety checks and driven by the mission to empower people to live valued, independent lives at home. MWO is emboldened by an organizational and financial strategy not to accept state or federal funding for their program services. MWO's stakeholders are beneficiaries of this strategy because it prevents the organization from being bound by much of the bureaucracy accompanying state and federal funding. MWO continues to leverage this strategy to create and maintain a competitive advantage in its competitive environment. MWO considers other organizations that offer similar program offerings and services to be competitors, but due to the nature of work services, the organization has a limited pool of direct competitors within the nonprofit industry.

Competitiveness Changes. MWO's leadership noted several recent competitive changes in their operating environment. MWO's leaders indicated that governmental responses to COVID-19 positively and negatively affected their competition position. MWO's leaders noted the positive effects, which included increased meal deliveries and service demand from the shutdowns and pandemic. MWO's leadership outlined that the pandemic's significant negative effects on the organization included (1) increased governmental regulations and restrictions on businesses and organizations, (2) increased resources devoted to volunteers to continue program service offers during the shutdowns, (3) unexpected logistical issues related to sourcing and procuring food and supplies. However, MWO's leaders expressed the need to be more innovative and entrepreneurial

in response to the competitive changes and embrace both the positive and negative impacts of the COVID-19 pandemic.

Two factors are determined from the outset: the organization's purpose and its funding source, thereby creating, to some extent, a barrier to organizational growth with NPOs being locked in by environmental or organizational constraints that dictate their competitiveness (Stühlinger & Hersberger-Langloh, 2021; von Schnurbein, 2017). These two factors result in NPOs finding strategies to navigate the constraints to thrive within their competitive environment ultimately. One of those strategies that MWO has implemented is resource-attracting activities. NPOs seeking public funding and donations tend to be more concerned with resource-attracting activities (Stühlinger & Hersberger-Langloh, 2021). Stühlinger and Hersberger-Langloh (2021) further stated that the effect of resource-attracting activities is strongest when seeking donations, as fundraising for public or private donations requires a great deal of effort and is highly competitive. Incorporating the resource-attracting activities strategy for MWO has fostered an approach of agility and resiliency to their competitive environment.

Comparative Data. Measurements should derive from business needs and strategy and provide critical data and information about key processes, outputs, results, outcomes, and competitor and industry performance (Baldrige Performance Excellence Program, 2021). The key sources of comparative and competitive data for the nonprofit sector include the John Hopkins Comparative Nonprofit Sector Project, Candid, the combined Foundation Center and GuideStar organization, nonprofit coalitions that aggregate and publish data, regulatory and government agencies such as Federal, State,

United States Bureau of Labor Statistics. The United States Census Bureau, comparative research reports and articles on the nonprofit sector, nonprofit sector journals, and books. Other sources of data on NPO financials, operations, and performance include annual reports, audited financial statements, Form 990s, online databases, and reports from interest, advocacy groups, and nonprofit assessment organizations such as Charity Navigator and Charity Watch. These comparative and competitive data sources are available for MWO to benchmark and develop competitive objectives or design and execute performance improvement initiatives.

Strategic Context

MWO's key strategic challenges include strategic resources to support its programs and services. The organization's senior leaders are tasked with finding strategic resources to continue to enhance program and service offerings. MWO also faces significant challenges with expanding its program offerings outside the local community to increase community awareness. MWO's leaders must deploy a strategic task force to combat this significant challenge and find mitigating opportunities to increase community awareness.

MWO's key strategic advantages include having a well-defined strategic plan that outlines objectives to deliver exceptional programs and services to customers (recipients). MWO's leaders have implemented strategies to achieve organizational, social, and financial viability objectives derived from stakeholder relationships. Stakeholder identification, procedures, responsibilities, interests, expectations, and political mapping are key strategic activities that MWO's senior leaders use to enhance strategic advantages

and pursue their objectives. MWO's strategic advantages are used to sustain organizational operations and garner stakeholder buy-in.

Performance Improvement System

To improve the performance of operations and the operational system of MWO, the senior leaders have engaged in scenario planning. This process includes strategically setting aside time to think of what-if scenarios and responses. The responses to these strategic sessions allow the organization to develop a thorough written plan in detail-oriented tasks and plans. MWO will then measure performance improvement based on practicing scenario planning to determine shortcomings or changes needed within operations and the operational system. MWO's executive director and senior leaders track performance against the set objectives and what-if scenarios, other incidents, challenges, threats, opportunities, and resources expended to achieve programmatic progress.

The COVID-19 pandemic presented significant challenges for MWO to achieve its strategic objectives and programmatic offerings. The restrictions to address the coronavirus pandemic on gathering and personal contact affected MWO's ability to deliver meals and associated programs; budget constraints and lack of funding forced a logistical challenge and impacted partnerships and volunteerism. The senior leaders of MWO identified a solution to these challenges by incorporating technology. The use of technology included implementing internal drives and new email servers to enhance the performance improvement system. With the help of the Board of Directors during quarterly meetings, the executive director assessed the challenges and risks and

encouraged opportunities to be more effective and enhance relationships with partners and volunteers. MWO's senior leaders have adopted the motto of delighted but never satisfied with the organization's approach to performance improvement.

Leadership Triad: Leadership, Strategy, and Customers

Leadership can be defined as mobilizing people to tackle challenging problems; this definition approaches (community) leadership as a set of dynamics occurring among and between individuals, groups, and organizations (Igalla et al., 2020). Certain leadership styles can mobilize people and formulate a strategy to attract customers. The leadership style can encourage, inspire, and motivate employees to seek innovation and positive change that is positively related to customer satisfaction and effectiveness (Budur & Poturak, 2021). Effective leadership styles are critical to an organization's strategic success and customer engagement.

The Baldrige Performance Excellence Program leadership triad is comprised of leadership, strategy, and customers. MWO provides program and service offerings for customers while engaging their internal and external stakeholders. The Baldrige Performance Excellence Program leadership triad and the stakeholder theory align when considering leaders of an organization's use of strategic planning tool kit to deliver value to internal and external stakeholders. In the Leadership Triad, I emphasize the importance of a leadership focus on strategy and customers.

Leadership

Senior Leadership

The senior leaders for MWO are comprised of its governing body, a board of directors comprising seventeen independent voting members, and an executive director who offers a diverse skill set and expertise of experience to the leadership and management of MWO. The board is responsible for governance and fiscal responsibility, including but not limited to personnel issues, financial oversight, fundraising activities, legal and regulatory compliance, stakeholder management, and community relations. Senior leaders are devoted to ethical convictions that shape their approach to operational efficiency, which plays into their operational environment. Furthermore, the senior leader's connection to the community and willingness to serve depict their desire to contribute positive social change to their community.

Establishing and Deploying the Vision and Values. MWO's executive director has extensive experience managing operations and oversees the organization's day-to-day operations. The executive director will report any observations or recommendations from overseeing daily operations to the board of directors. MWO leaders have built a servant leadership style culture that has been fostered to deploy the vision and mission to every organization member through weekly meetings and organizational outings. Through traditional, electronic, and social media, MWO's leaders regularly communicate these guiding principles, vision, mission, organizational and social objectives, and results amongst the internal and external stakeholder groups.

Commitment to Legal and Ethical Behavior. MWO leaders comply with all applicable laws and regulations. All team members, volunteers, partners, and community resource groups must comply with all laws and regulations. MWO leaders have published policies and procedure manuals outlining document retention and destruction, whistleblowers and retaliation, and conflict of interest and resolution. Leadership presents and communicates these board-approved policies, procedures, and manuals organization-wide through onboarding, requiring team members to acknowledge and sign the employee handbooks. The senior leaders promote workforce compliance amongst their team members and have fostered a culture of ethical behavior by establishing a code of conduct. The executive director contracts an independent firm to conduct an annual audit of operational practices and financial statements to ensure operations and compliance with federal and state regulations. MWO operates ethically by providing a generally accepted code of conduct and treating all stakeholders fairly, respectfully, and with dignity.

Stakeholder Communication. MWO senior leaders use a variety of communication channels and techniques to communicate with and engage stakeholders. These communication channels include phone calls, text messages, email, and social media. MWO senior leaders use the techniques derived from a philosophy of over-communication, which is key, executed by publishing important information about activities, programs, and services on the organization's website. Direct communication tools to engage internal and external stakeholders include Microsoft Outlook email and telephone communication.

MWO has enhanced its stakeholder communication due to the reliance on a group of key stakeholders, including volunteers and community partners. The volunteers and community partners are part of the essential partnerships for MWO to deliver program and service offerings effectively. MWO leaders use bi-weekly meetings and printed media, including newsletters, to communicate with this group of stakeholders. MWO senior leaders also attach a story to thank you notes provided to this key stakeholder group. The communication strategy and tactics of MWO are rooted in dependence on valuable relationships developed over long periods.

Creating an Environment for Success. MWO's senior leaders continuously monitor their operational and competitive environment through periodic reviews of competitors' market data. Organizational strategy evolves from strategic-focused conversations with internal and external stakeholders. MWO's directors and senior leaders conduct strategic objectives and task creation exercises to properly align stakeholders' needs, interests, and input with the organization's strategic plan and objectives. Conducting these exercises allows MWO's senior leaders to set achievable goals with the opportunity for the least probability of encountering stakeholder pushback or rejection.

Each director is assigned to committees and is involved in fundraising and relationship development. The board of directors meets in 10 of the 12 months of the year, addressing issues and matters pertaining to governance and fiscal responsibility. The committees meet on the off months of board meetings to discuss the additional governance responsibility and report at the board meeting. During their monthly

meetings, MWO's leaders report to the board on organizational and financial performance and strategic objectives. MWO's board of directors also addresses their meeting operational performance against the organization's identified fiscal and operational goals.

Creating a Focus for Action. MWO's board of directors and the executive director have committed to creating lines of communication from governance to leadership and then disseminating them organization-wide. These lines of communication allow for goals, strategic objectives, and tasks to be consistently shared across every level of the organization. The leaders of MWO meet monthly to review current performance versus the projected plan and outline steps to take to adjust as needed. The executive director informs the board of directors of adjustments or strategy changes.

MWO's leaders provide adequate resources for pursuing strategic and operational goals, cultivating relationships to support goals, and implementing effective processes and procedures. MWO's leaders conduct stakeholder engagement meetings via town halls and social hours to sensitize their stakeholder groups to activities and programmatic offerings. MWO's leaders have committed to promoting an organizational culture based on shared values, contributing to positive social change, investing in and giving back to their local community, and committing to a code of conduct of ethical behavior. MWO commends and rewards stakeholder performance through internal awards and recognition, nominations for state and national commendations and awards, gifts, and citations.

Governance and Societal Responsibilities

The Baldrige Performance Excellence Program (2021) defined governance as an organization's ability to ensure operational transparency, accountability to shareholders, and accountability to all stakeholders. MWO adheres to strict practices and processes that ensure responsible governance, evaluate leadership performance, promote ethical behavior, and contribute to positive social change. MWO is an NPO with social and organizational objectives to contribute positively to the community in which they operate. MWO is a 501(c)(3) public charity that is not a private foundation, receiving a substantial part of its income directly or indirectly from the public, and is required to file an IRS Form 990 or 990-EZ.

Ensuring Responsible Governance. The IRS Form 990 or 990-EZ is an organization's annual information return to provide the IRS with statutory information on the organization's activities. Parts I through XII of the form must be completed by all filing organizations and require reporting on the organization's activities, finances, governance, and compliance with applicable laws and regulations. An organization's Form 990 filings are legally required to be made available to the public by the IRS and the filing organization. Some stakeholders and members of the public rely on an organization's Form 990 filing as their sole source of information regarding the organization's programmatic activities and form the basis of their reception of the organization.

MWO has an established board of directors that governs its operations and an executive director overseeing daily operations. The executive director reports to the board

of directors, and board members are subject to ethical and professional conduct underpinned by laws, regulations, and general NPO guiding principles. The executive director prepares all statutory, regulatory, state, and federal tax filings. MWO files Form 990 annually, and the filings are available publicly via the IRS website or GuideStar.

Evaluating Governance Performance. The board of directors is not compensated for services rendered to MWO, and all board members contribute financially to MWO. The board term for each director is 3 years, with a renewal option for a singular 3-year term. Board members communicate with critical partnerships and external stakeholder groups within their areas of expertise. The board of directors is accountable to the national office of the affiliate organization and the local partners and volunteers in the community.

Board members play an integral part in the success of MWO through their generous financial contributions and sharing of their expertise, professional networks, and business and community relationships. MWO benefits from the strategic foresight of the board and its involvement in other for-profit and nonprofit organizations via executive positions and board memberships. Board members' performance is evaluated by the board development committee based on their contributions of their financial resources, time, and expertise and reported in their annual performance evaluation meeting conducted by the board development committee.

Addressing Current and Future Legal, Regulatory, and Community Issues. Social issues and change underpin MWO's social purpose. MWO's vision, values, objectives, and processes address identified, current, and pertinent issues. The executive

director and MWO's board members continually scan the operating and competitive environment for evolving issues to identify potential risks and impact on MWO's organizational and social goals, objectives, and plans. The executive director has positioned the organization not to accept governmental money, which allows MWO the freedom to not abide by the governmental regulations and compliance for this funding category. Furthermore, the executive director engages an external auditor to audit MWO's processes and procedures annually to ensure legal and regulatory compliance and ethical operations, protecting MWO from financial liabilities and the risk of future legal or regulatory issues. MWO actively engages community stakeholders, leaders, civic and law enforcement agents, community partners, and other community actors to identify areas of possible conflict and address them before they become significant issues.

Promoting Ethical Behavior. MWO has board-approved and published policies and procedures on document retention and destruction, whistleblowers and retaliation, and conflict of interest. The executive director annually engages an independent firm to audit operational practices, policies, and financial statements to ensure MWO operates ethically and follows federal and state regulations. MWO's executive director shares the audit reports, audited financial statements, and related tax forms with the audit committee, presenting them to the board of directors for approval and strategic discussions.

Furthermore, MWO has policies and procedures outlined in employee handbooks and tutorial videos published and communicated organization-wide to promote workforce compliance. MWO leaders adhere to a code of conduct to comply with all applicable

laws and regulations. Any meeting, community engagement, and communication amongst the board of directors or board committees authorized to act in its capacity are contemporaneously documented and recorded via board meeting minutes. The leaders and volunteers of MWO perform safety checks of their recipients and conduct training regularly to promote a culture of societal well-being and ethical behaviors when running programmatic service offerings.

Contributing to Societal Well-Being. MWO's leadership consistently promotes society's well-being, locally and globally, via their vision, mission, and value-oriented behaviors with their recipients and stakeholder groups. The mission of MWO is to address the hunger, isolation, and unique needs of the homebound. The vision of MWO is for their local community to be a place where the homebound live nourished and valued lives. The most important values of the organization are for recipients to be physically nourished, which in turn will allow them to make healthier life choices; through thoughtful community collaboration and volunteerism, more can be achieved, and the homebound are better served; and volunteers enjoy purpose through opportunities to impact the lives of friends and neighbors directly. As a nonprofit human services organization, MWO's leadership conducts its mission, vision, and values daily and improves society through its services, guidance, and advocacy.

Support and Strengthen Key Communities. MWO's leadership, volunteers, and workforce strengthen its key community of homebound recipients in several ways. The first and most apparent method is supplying low-cost nutritious meals to all homebound regardless of their ability to pay. MWO's leaders, volunteers, and workforce

also provide newsletters and media publications to provide continuous education on their services and broadcast the accessibility of services to their local community. MWO's advocacy efforts focus on MWO's leadership attendance at meetings of the local hospitality, city council, and civic groups, which would not be possible but for its partnership with the city and local for-profit businesses and non-profit organizations. Lastly, the organization's leaders support and strengthen their key communities because they value promoting a nourished and cherished life through civic space and within society.

Strategy

I summarize MWO's leadership methods for developing and implementing organizational strategy in this section. Leaders are responsible for creating a strategy to be used as a guide toward achieving strategic objections and goals. Strategy development and implementation are essential considerations for nonprofit organizations.

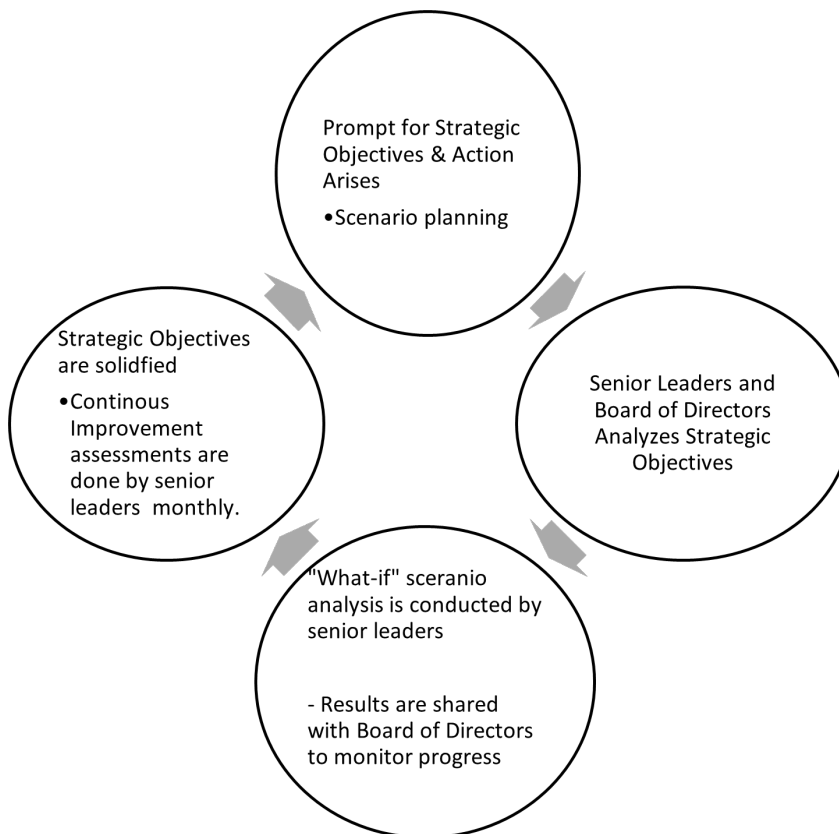
Strategy Development

Strategy development entails the conduct and process of strategic planning, innovation, processing data and information, bifurcating essential strategic functions amongst the workforce, creating key objectives and a timeline, and balancing strategic objectives across competing needs. The development of strategy is a complicated process.

Strategic Planning Process. Strategic planning and management are the ways for organizations to prepare themselves to sustain and overcome competition in marketplaces; it is a process that begins with self-assessment and realization and then

reorganization to compete in a business environment (Kabeyi, 2019). MWO's 5-year strategic plan aligns with these objectives to continue program offerings, strengthen partnerships to achieve organizational objectives and increase stakeholder buy-in and financial contributions. MWO's leaders implemented these strategic objectives to achieve organizational, societal, and financial sustainability objectives underpinned by stakeholder relationships. It is a challenge for NPOs to spend their funds and divert their efforts in such a way that all of their stakeholders are satisfied (Stühlinger & Hersberger-Langloh, 2021). Given this challenge, MWO has created strategic objectives to align with its strategic plan. The strategic objectives are overarching but provide a granular focus for the senior leaders.

MWO also applied a timeframe to the strategic objective to hold senior leadership accountable for the objectives. For 2012 – 2015, the strategic theme was wildly important goals. The three goals for this period included establishing a recognizable brand, delivering quality meals, and financial stability. MWO's strategic theme for 2015 – 2018 was titled Reach All in Need. Senior leadership, the staff, and volunteers focused on attracting referrals and education within their local community. For the next three years, 2019 – 2022, MWO was grounded in the strategic theme of transformative leadership. During this period, MWO's senior leadership was all hands on deck for sharing passion and stewarding society. Currently, MWO's strategic theme for the three years of 2022–2024 is to nourish the need and fuel the future. MWO senior leaders are focused on sharing their passion to ensure the organization's future.

Figure 1*MWO Strategic Planning Process*

Innovation. MWO's leadership identified the need to rework the strategic planning process to incorporate innovation. From this realization, leadership decided to rework the belief values and rewrite the mission, vision, and values. MWO's leadership was allowed to view things differently and incorporate innovation in the organization's strategic planning processes. MWO's leadership felt the belief statements guide the organization to think strategically and take advantage of the opportunities presented in a decisive and recommended way.

Furthermore, the executive director has promoted a culture of “take the time to internally process before execution,” in other words, to think through what makes the most sense for the organization strategically and wholistically before execution. MWO’s leadership felt the need to deliberate intentionally by taking the time to think through the impact of implementing a new program. This includes asking the right questions to determine what suits the organization and the timing to pursue the innovative idea or strategic process.

Data Collection and Analysis. MWO’s leadership recently began improving its data metrics and information collection efforts formally and informally. This process started with MWO’s leaders onboarding a workforce committed to collecting and quantifying financial and non-financial data of their program service offerings and business operations. Some of these collection improvements are due to having a workforce in certain positions to handle the day-to-day operations, allowing for time for MWO leaders to conduct strategic data collection and analysis. However, MWO’s leaders also acknowledge that many reasons for seeking better metrics are to run the organization more efficiently and plan strategically. For example, many non-financial collection efforts are related to community engagement and survey the needs of the community MWO serves. Also, MWO leaders have acknowledged that with organizational growth, a better focus on financial metrics regularly and thinking strategically is of grave importance. The organization can make strides in quantifying and qualifying its strategic aims and actions by utilizing and attaining these improved data and collection efforts.

Functional and Operational Strategies. The leadership of MWO noted that it has a small but mighty workforce to divide the organization's strategic and tactical operations. MWO's leaders believe they must optimize the organization's workforce by segregating strategic focuses on the day-to-day operations amongst departments and volunteer groups. Furthermore, because of the small workforce, the executive director must also perform a portion of the daily operating tasks of the organization in addition to doing things such as marketing, networking, reviewing publications, and coordinating volunteers periodically. Therefore, MWO's leadership has begun to expand to allow for specific expertise within the organization to eliminate the need for outsourcing options via external services. MWO's leaders manage their organization through this bifurcation between the workforce and others.

Work Systems and Core Competencies. MWO has established a workforce system that identifies the strengths of each personnel through onboarding questionnaires and personality tests. Once these strengths have been identified, specific tasks are assigned that allow the workforce to have the opportunity to work within their strengths on some of their assigned duties. Furthermore, MWO leaders have strategically assigned responsibilities to each team member to correlate the right person to the area of the work system so that they can be more productive. MWO leaders have also offered training of new employees on the work systems and the belief values to allow an understanding that their time has value and is the key to making strategic changes and innovative processes. This new work system has been a mindset shift for MWO leaders, making those changes effective within the organization.

MWO's leaders have determined future organizational core competencies and work systems by perpetual revisors, which entail being delighted but never satisfied. MWO leaders and workforce have embodied this mantra by consistently improving and making changes for the betterment of the organization. An example of consistent improvement is that MWO leaders always intrinsically access the future by asking, "How can we prepare to be doing more tomorrow?" MWO leaders prepare for growth by quarterly reviewing the work system and core competencies. MWO's leaders have implemented a continuous growth mindset, with the focal point being continuous improvement as the organization's primary focus at all times.

Strategic Objectives, Goals, and Considerations. Business strategy is an organization's plan to achieve a sustainable competitive advantage in its chosen market (Fuertes et al., 2020). The five forces – the threat of new entrants, bargaining power of buyers, bargaining power of suppliers, threat of substitute products or services, and rivalry among existing competitors - were considered applicable to every industry, regardless of the level of technology or economic development (Isabelle et al., 2020). MWO leaders manage against Porter's five forces to deliver social objectives to stakeholders competitively in ways that public or private organizations cannot or will not serve and to ensure MWO remains financially viable. MWO's leaders have identified the strategically paradoxical objectives, the contradictory yet equally important goals of the social mission, and financial viability as central to competitiveness in their operating environment.

In an environment of increasing social needs, finite resources, increased competition for scarce resources, uncertainties such as global pandemics, and economic crises, MWO's leaders simultaneously address multiple competing strategic demands. MWO's strategic objectives for the next 3–5 years include (a) enhancing programs to gauge outcomes of providing nourishing meals and safety checks for the homebound, (b) identifying and building relationships with current partners with shared goals and objectives, and (c) ensuring quality meals and effective communication to the local community. Proposed activities and considerations to deliver the strategic objectives include partnering with stakeholders to sponsor community events, participating in holiday festivals and parades, hosting monthly community activities for recipients, and continuing fundraising events and projects.

Strategy Implementation

In this section, I describe how MWO's leadership implements the strategic objectives and deploys key action plans, ensures the availability of resources to support key action plans, and uses key workforce plans to support key action plans. Nonprofit innovation includes the willingness to take risks to achieve desired development goals better and promote positive social transformation by implementing new and improved ways of achieving meaningful impact (Svensson et al., 2019). I also discuss how the organization's leaders employ key performance measures to track key action plans, make and elucidate key performance projections, and shift action plans when needed.

Key Action Plans and Deployment. MWO's executive director and senior leaders are responsible for developing and implementing strategic action plans. Annually,

the senior leadership team participates in a strategy development offsite retreat as a brainstorming session. Following strategy development offsite retreats and brainstorming sessions, the executive director and senior leaders create an implementation plan and fiscal budget that integrates the strategic direction and objectives, the organization's resources, processes, procedures, capabilities, and stakeholder relationship vectors. The executive director and senior leaders measure the available internal resources and engage external stakeholders to understand their expectations, alignment with MWO's strategic objectives, available resources, a schedule, and willingness to support the implementation plan with resources. With the knowledge of available resources and capabilities, the executive director and senior leaders then develop functional and operational plans and fiscal budgets for five core areas: (a) administrative, human resourcing, and operations (b) volunteers and service areas, (c) financial and funding operations, (d) stakeholder management and communication, and (e) program planning, execution, performance tracking, and reporting.

Ensuring the Availability of Resources to Support Action Plans. MWO's leadership has fostered an approach to the organization's workforce, including a mixed-use of paid staff and volunteers. Volunteers allow the organization to manage an extensive service area and contribute numerous service offerings such as lunch programs, supper services, Saturday meals, and nutritional supplements. MWO's leadership believes cross-training amongst staff positions and volunteers is an opportunity to enhance program offerings. For example, a staff member might take the opportunity to bring volunteers into the kitchen to watch how to prepare meals before delivery for more

of a hands-on experience. These opportunities taking place simultaneously may result in efficiency losses but are also value-added opportunities for volunteers, customers (recipients), and stakeholders.

Furthermore, MWO has managed the risks associated with these plans by being strategic with each staff member and volunteer's time and leveraging financial resources through fundraising activities. MWO receives 90% of its revenues from contributions and grants and the remaining funds from program revenue—further efforts to garner greater availability of financial resources for the organization's workforce and strategic plans.

Key Workforce Plans Supporting Action Plans. MWO's leadership believes that one of its biggest challenges is increasing its size and developing its workforce. The organization's leaders have not encountered an issue motivating staff to implement and achieve action plans or complete their obligations to the community and stakeholder groups. However, they think they could achieve more with a larger workforce.

Specifically, the organization could use more people to implement strategic action plans and fulfill day-to-day operations. However, the organization's budgetary constraints limit its leaders' ability to bootstrap such growth in the workforce. Therefore, the organization relies significantly on the volunteer part of the workforce to implement many of its strategic action plans. MWO's leadership would like more staff members to support strategic action plans more efficiently and expand the scales and scope of service offerings.

Key Performance Measures for Tracking Action Plans. MWO's leadership has a client data-based system called MDS that collects data on the customer (recipient). The

data collected included the number of meals received, age, health conditions, and other indicators. The organization's leaders review this data monthly to assess whether team members and volunteers carry out the organizational mission. Twice a year, the executive director reports the data and poverty level information to the staff and volunteers at their organization-wide meetings for open dialogue. Furthermore, the executive director reports monthly to the board on the collected data to reinforce organizational alignment with the strategic objectives.

Key Performance Projections. MWO's leadership has expressed interest that they could collectively do more concerning making key performance projections and modeling what it would like the organization to do prospectively. The leadership has identified gaps between current service offerings while striving for more to service its vision, mission, and values. Also, MWO's leaders think more could be developed and projected regarding its key performance indicators and obligations. It explicitly enhances the organization's footprint to collect more social and emotional data from customers (recipients) to project the impact of performance compared to comparable organizations. Furthermore, MWO's leadership thinks that creating key performance indicators and a scorecard would be beneficial in addressing the organization's future performance projection compared to comparable organizations. This is a reasonable and fair proposition to enhance the organization's services and measure performance against peers and competitors.

Shifting Action Plans. MWO's leadership has experienced shifting action plans to meet emergencies, new priorities, and improving organizational performance. The

organization's leaders think they, staff, and volunteers do well with innovation, especially shifting plans when required. Svensson et al. (2019) stated that some define innovation as "using available resources in a creative way to involve the community in change. MWO leadership has frequently used partnerships and community groups when a shift is needed to make the organization agile and nimble with shifting action plans and related activities.

Customers

In this section, I describe how MWO's leadership and workforce meet customer expectations and facilitate customer engagement. Customer engagement leads to frequent interactions with a focal object (brand or medium) beyond the transactional motive of making a purchase (Thakur, 2019). Both aspects of customer relations are critical for the strategic success of the organization and the realization of its vision, mission, and values.

Customer Expectations

In this section, I analyze how MWO's leadership obtains actionable information from potential customers (recipients), determines customer (recipient) groups and market segments, and determines product offerings. Changing customer expectations must be articulated and incorporated more comprehensively to include physical, mental, and social well-being (Zhang et al., 2023). The organization's leaders expressed areas of strength and improvement within this section.

Obtaining Actionable Information from Customers (Recipients). MWO's leadership has established multiple ways to get actionable information from customers. An initial interview is conducted with each customer to discover service level needs. The interviews conducted by volunteers allow customers to discuss their current issues, which

are then reported to the client organization to develop a customer profile. MWO leadership will then use these data and customer profiles to work with staff members to help with customer engagement and service offerings. MWO's leadership also deploys service feedback surveys to customers. MWO's leaders received a significant response rate to the customer survey, which was invaluable feedback. It is through the attainment of such feedback and information that MWO's leadership can listen and respond to its customers.

Obtaining Actionable Information from Potential Customers (Recipients).

MWO leadership has conducted a pre-screening process to determine eligibility for services due to their qualifications. The qualifications for services include living in the service area, being homebound (physical issues the potential customer is dealing with), not preparing an appropriate meal for themselves, or not having anyone to prepare the food for them. MWO's leadership, staff, and volunteers have mastered the art of inferring information from the pre-screening interviews to allow customers to feel comfortable sharing their service needs versus being directly asked. After the pre-screening interviews are conducted by MWO staff and volunteers, customers are followed up to discuss their living and financial situations. Furthermore, MWO leadership has committed to staying in touch with customers through regular wellness check calls.

Determining Customer (Recipients) Groups and Market Segments. MWO's leadership explained that each customer group is divided into dietary needs and meal requirements. The organization's leadership keeps a pulse on the customer groups who fit in low-income or nutritional issues categories. MWO's leaders have expressed that there

is a grey area for market segmentation due to the proximity of outlined areas of services. Furthermore, MWO leadership assessed the customer group based on conversations with customers and the use of emotional intelligence when asking open-ended questions to determine service needs.

Determining Product Offerings. MWO's leadership conducts 30, 60, and 90-day follow-up interviews with customers to engage customer satisfaction and introduce new product offerings. For example, the organization piloted providing animal meals, which are meals for the customers' animals. Customers have asked explicitly for this program to continue, and the organization's leaders have responded. MWO leadership has asked initial questions to gauge customers' views on the product while using these responses as market research for new products or service offerings.

Customer Engagement

In this section, I analyze how MWO's leadership engages their customers (recipients) by building and managing customer (recipient) relationships, enabling customers (recipients) to seek information and support, managing customer (recipient) complaints, determining customer (recipient) satisfaction, dissatisfaction, and engagement, obtaining information on customer (recipient) satisfaction relative to other organizations, and using voice-of-the-customer and market data and information.

Building and Managing Customer (Recipient) Relationships. MWO's leadership has built relationships with customers (recipients) through effective lines of communication between volunteers and recipients to allow for feedback and receive organizational updates. For example, the volunteers interact with the customers

(recipients) daily when delivering meals. MWO's leadership has established an organizational goal for a volunteer to interact with a customer (recipient) at least once daily. Also, the organization's leadership has communicated with customers (recipients) that they are not social workers but refer such services to other agents.

Enabling Customers (Recipient) to Seek Information and Support. MWO's leadership believes in allowing customers (recipients) to seek information and support through written and virtual methods. MWO's leaders distribute newsletters and reminders about services offered and updates on current community events. MWO's leaders notify recipients of any changes to the delivery schedule due to holidays or closings. It is through such objectives and procedures that information and support optimize the customer's (recipient's) experience.

Managing Customer (Recipient) Complaints. The organization's leaders explained that they do not have an explicit policy for dealing with complaints. However, they use the main phone line as an option to provide information on allergies or dietary needs. MWO's leadership has committed to accommodating customer (recipient) dietary needs and addressing all complaints within a 48-hour turnaround time. If further action is needed to determine a resolution for a complaint, the Executive Director will be responsible for this completion.

Determining Customer (Recipient) Satisfaction, Dissatisfaction, and Engagement. MWO's leadership believes that its best source for deciding customer (recipient) satisfaction, dissatisfaction, and engagement is related to direct feedback from customers (recipients) via phone calls and thank you notes. Another form of satisfaction

and engagement is through repeat meal requests and candid conversations with volunteers during scheduled deliveries. MWO's leadership has also created a taste test environment that allows customers (recipients) to provide real-time meal feedback before they are added to the menu. Furthermore, MWO's leadership relies on word-of-mouth promotion and referrals within their local community to gauge engagement and as a metric if the organization's workforce and leaders are providing satisfactory services.

Comparing Information on Customer (Recipient) with Other Organizations.

MWO's leadership believes that they and the workforce do well in satisfying their customers(recipients). However, the organization's leadership acknowledges that no hard metrics or comparable data are used to support this feeling. MWO's leadership also acknowledged not being aware of any national survey that can be applied for local comparison of current program service offerings. The organization's leadership has committed to performing due diligence shortly to obtain comparable organizations and data metrics.

Using Voice-of-the-Customer (Recipient) and Market Data and Information.

MWO's leadership obtains voice-of-the-customer (recipient) data and information through their 30-60-90-day onboarding interviews with new customers (recipients) and follow-up surveys with current customers (recipients). This process has allowed the organization to obtain the voice-of-the-customer (recipient) from initial interaction with the organization throughout 90 days of services. MWO's leaders use the market data and information in their newsletters distributed to all current customers (recipients), community partners, and key stakeholders. Furthermore, MWO leaders use the data and

information as data points to inform the strategic objectives and priorities of the organization during their strategic planning sessions. To highlight the voice of the customer (recipient), MWO's leadership will post customer (recipient) testimonials on their website and social media pages.

Operating with a small workforce has required MWO's leaders to be agile and uniquely responsive to customers (recipients). Moreover, MWO's leadership expressed the importance of responding to every customer (recipient) matter. The organization has incorporated feedback from internal and external stakeholder groups by adjusting delivery routes, schedules, and meals. However, the organization does not use broader market data to supplement or compare its direct or indirect approach to customer (recipient) interactions. MWO's leadership primarily relies on customer (recipient) interactions with volunteers and feedback. MWO's leadership honestly assessed their market data usage and was aware of the ramifications of not seeking broader market data. However, MWO's leadership is confident with their means of extracting the voice of the customer (recipient) about an organization, its size, and adequate response time. Therefore, MWO's leadership does not seek to change its approach to receiving customer data and voice metrics.

Results Triad: Workforce, Operations, and Results

A core value and concept of the Baldrige Performance Excellence Program (2021) is the execution and delivery of values and results. Results can be used to report to funders, as a promotional tool, or to procure new funding (Mayer & Fischer, 2023). An organization's leaders must develop outcomes and prioritize achieving, measuring, and

analyzing results. The Results Triad section contains the components of workforce, operations, and results. In the Results Triad, I provide data and information on MWO's workforce-focused and key operational processes based on the Baldrige Performance Excellence Program (2021) defined factors approach, deployment, learning, and integration, and the performance results that derive from these processes evaluated using the factors levels, trends, comparisons, and integration.

Workforce

Workforce Environment

An organization's workforce comprises permanent, part-time, temporary, onsite, remote, field, and contract employees engaged in accomplishing the organization's work, mission, vision, and objectives, including volunteers, in the case of organizations that rely on volunteers to fulfill their objectives (Baldrige Performance Excellence Program, 2021). MWO's leadership prides itself on the supportive and effective environment amongst its engaged workforce, which includes volunteers. In this section, I assess MWO's leadership (a) workforce capability and capacity; (b) recruiting, hiring, and onboarding new workforce; (c) preparation of their workforce for changing capabilities and capacities; (d) the organization and management of their workforce; (e) assurance of workforce health, security, and accessibility; and (f) the support of their workforce with services, benefits, and policies.

Workforce Capability and Capacity. MWO's leadership has established a culture that can connect with people and a willingness to serve. Cultivating this culture has allowed MWO's leadership to build its workforce capabilities and capacity needs

through assessment of cultural fit and areas of improvement. Another significant indication of the organization's workforce capabilities is the ability to display empathy for others. MWO's leadership continuously assesses capacity needs to determine the optimal time for hiring initiatives. Mission orientation is MWO's leadership's main criteria for sustaining organizational structures and fulfilling business operations.

Recruit, Hire, and Onboard New Workforce. Even as a small organization, its leadership aims to effectively recruit, hire, and onboard its workforce. MWO's leadership uses the following attributes for recruitment and hiring: education, social skills, and personality tests. The organization's leaders use social media, speaking engagements at local partnerships, and career fairs as methods for recruiting. They seek to hire people who are kind, compassionate, display empathy for others, are thoughtful, and possess competencies in their job description.

Furthermore, MWO's leadership has identified word of mouth within the local community as their best recruiting method. MWO's leadership has assigned a member of the workforce to conduct the onboarding process for new members. This member communicates regularly with the new workforce during their first 90 days of employment. MWO's leadership annually assesses the new workforce's recruitment, hiring, and onboarding process and has committed to continual improvement for the future workforce.

Preparing Workforce for Changing Capability and Capacity. MWO's leadership has proactively prepared its workforce for changing capability and capacity through scenario planning and walkthroughs. Through their strategic planning process,

the organization's leadership has identified "what-if" scenarios that are then performed as walkthroughs with the workforce to prepare for changes in personnel capabilities and capacity. The organization has grown financially over the last four years, resulting in a larger workforce. MWO's leadership believes that constantly changing and improving their service delivery has allowed them to prepare the workforce for change.

Organizing and Managing Workforce. MWO's leadership has established clear lines of communication via phone or direct conversation with the workforce. The organization's leaders have formed relationships with the workforce, allowing organization and management. Furthermore, MWO's leadership offers quarterly training to the workforce, including mission work and delivery routes. The organization's leadership has invested financial resources in a volunteer management system that structures the delivery routes by volunteer and day of the week. The volunteer management system also allows MWO's leadership to manage workforce needs concerning shortages on certain routes and organize workforce capacity.

Ensuring Workforce Health, Security, and Accessibility. MWO's leadership acknowledged that ensuring workplace health, security, and accessibility can be challenging for a nonprofit organization operating from its partnership office site. Regarding workforce health, MWO's leaders cited COVID-19 restrictions and associated complications as a recent and significant challenge to ensuring a healthful workplace. MWO's leaders had to pivot service delivery to accommodate governmental regulations, which included implementing coolers and vaccination training. MWO's leadership has established internal policies and procedures to ensure workforce health, security, and

accessibility. MWO's leadership has enforced internal policies to include delivery in pairs (two or more people) to provide safety for the deliverer and to drive away if the deliverer feels uncomfortable delivering the meal. MWO's leadership has encouraged the workforce to use their best judgment and to call leadership ultimately, and they will handle the delivery or situation from there.

Supporting Workforce via Services, Benefits, and Policies. MWO's leadership has set out to support their workforce via services, benefits, and policies. MWO's leadership acknowledges that a significant number of their workforce is unpaid volunteers, which has affected their offering of organizational benefits to this workforce group. However, MWO's leadership has subsidized this by hosting volunteer appreciation dinners and spotlighting volunteers in the widely distributed newsletter, to name a few things. Furthermore, MWO's leadership offers competitive wages, good retirement benefits, and moderate health care benefits to the support staff of the workforce in comparison to other organizations within their community.

Workforce Engagement

MWO's leadership has committed to engaging the workforce in the organization's operations to foster retention and high performance. In this section, I assess MWO's key drivers of workforce engagement; evaluate the level of workforce engagement; furtherment an organizational culture underpinned by openness, high performance, and engagement; adopt a system of high performance, learning, and development system support for personal development of its workforce and organizational needs; and approaches to manage the career development of its workforce.

Determining Workforce Engagement Key Drivers. Through direct conversations, MWO leaders understand the key drivers of engaging their workforce: support staff and volunteers. These conversations have revealed some critical drivers: pay, benefits, flexibility, a positive work environment, and customer (recipient) facing roles to connect the mission work and its workforce. Furthermore, MWO's leadership has established a continuous improvement mentality amongst their team and the workforce. In return, the organization's leadership seeks to identify, improve its understanding of, and act upon the key drivers of its workforce engagement.

Assessing Workforce Engagement. MWO's leadership supports workforce engagement through an emotional and intellectual commitment, which is central to MWO's values. MWO's leaders assess workforce engagement by measuring responses to surveys and interviews from the workforce during and after their tenure with the organization. The organization's leaders have embodied a philosophy that the opportunity to return to the organization is open as long there has not been involuntary termination. MWO's leadership can effectively assess and act upon workforce engagement through a direct and interactive approach.

Fostering a Culture of Workforce Openness, High Performance, and Engagement. MWO's leadership fosters a culture of openness, high performance, and engagement. The organization's leadership embedded principles of honesty through direct communication (i.e., face-to-face conversation) with the workforce. By fostering this environment by MWO's leadership, the workforce took ownership and accountability for organizational performance. The workforce feels engaged and as if

MWO's leadership hears their voices. Furthermore, MWO's leadership has implemented appreciation social media posts and hand-written 'thank you' notes, which has fed into workforce high performance and engagement.

Fostering Workforce High Performance. MWO's leadership boosts high workplace performance by direct communication and managing workforce expectations. The workforce expects to be compensated regularly for their high performance and to remain fully employed by MWO. Another expectation is that MWO offers comparable benefits to those offered within their local community. MWO's leadership embraces these expectations of the employees by holding the workforce accountable for high performance to receive reciprocation of these expectations. MWO's leadership has committed to fostering high performance by placing workforce members at pickup sites to greet other workforce members with words of encouragement, motivational quotes, and gratitude reminders.

Learning and Development System for Workforce. MWO's leadership strives to balance supporting its workforce's personal and professional development while managing its needs. The organization's leadership has created 'how to' videos providing on-the-job training before completing any job duty. MWO's leadership has also created ride-along videos that allow workforce members to engage in continuous training on job responsibilities to be used as a development system. The organization's leadership has encouraged each member of the workforce to review the training videos, which outline how to conduct their work responsibilities correctly. Furthermore, MWO's leadership has

offered training options via organization-sponsored online webinars and offsite conferences and trainings.

Managing Workforce Career Development. MWO's leaders do not have a formal career development management system but have created an internal process. The organization's leadership has established workforce members meeting with leadership to discuss their career development and opportunities for growth. The executive director has regularly scheduled one-on-one meetings with the senior leadership team to discuss career development. MWO leadership has empowered middle-level management to conduct the same process with the members of their respective teams. MWO leadership has committed to formalizing a career development management system to be deployed organization-wide.

Operations

In this section, I describe how MWO's leadership designs, manages and improves its key products and work processes. The operational model defines where and how the organization designs, manages, improves, and innovates products, services, and work processes and improves operational effectiveness to achieve organizational and social objectives and deliver stakeholder value (Baldrige Performance Excellence Program, 2021). The organization's leaders are responsible for daily operations and implementing organizational processes and procedures.

Key Products and Work Processes

MWO offers meal services and programs (Table 1). These services and programs were derived from MWO's desire to deliver their vision and mission to the community

they serve. In this section, I describe how MWO's leadership determines, designs, manages, and improves its key products and work processes. This is done by explaining how its leaders (a) determine the organization's key products and work processes; (b) design and ensure its products and work process requirements; (c) design its products and work processes to meet the organization's key process requirements; (d) determine their key support processes; improve work processes and support processes; (e) manage their supply network; (f) pursue innovate opportunities.

Determining, Designing, Managing, and Improving Key Product and Work Processes. The leadership of MWO has organized its operations and work processes to be in a state of constant improvement grounded in its functional disciplines of stakeholder relationship management, fiscal responsibility, health and regulatory compliance, and continuous business operations. MWO's leadership has created operational plans for each functional discipline to manage and improve key product and work processes. This process allows MWO's leadership to collaborate with the workforce to keep its essential products and work processes current with evolving business and industry demands. Finally, MWO's leadership has committed to making managerial and organization-wide decisions with the utmost seriousness and care regarding determining, managing, and improving its key product and work processes, with the intentionality of keeping the needs of its customers (recipients) and other vested stakeholders in the forefront of this decision-making process.

Designing and Ensuring Product and Work Process Requirements. MWO's leadership works diligently to design and ensure its products and work processes meet

organizational requirements. The leaders and workforce have cultivated partnerships with other organizations to ensure product and work processes are adhered to through shared space for meal preparation. Also, MWO's leadership has implemented the process of sealing meals and a sealer who ensures the meals meet health and regulatory compliance work process requirements. These efforts of design and assurance by MWO's leadership and workforce have allowed work products and processes to remain at continuous quality and performance improvement standards.

Key Work Products and Associated Processes. MWO's leadership has identified appropriate work products and processes to serve their customers (recipients) and stakeholder groups. The leaders and workforce use a combination of actions outlined in the operational plans to deliver the key work products. In Table 3, I present the organization's key products and associated processes, requirements, and measures.

Table 3

Key Products and Processes and Measures

Product	Processes	Measures
Meal Preparation	Every meal is diabetic and heart-friendly	Quality of meals for customers (recipients)
Menus	Tailored to specific dietary needs	Specified meals for customers (recipients)
Home Delivered Meals	Prepared fresh at strategic partnership	Meal offering for customers (recipients)
Blizzard Box Meals	Prepared fresh at strategic partnership	Meal offering for customers (recipients)
Ensure Delivered	Prepared fresh at strategic partnerships	Meal offering for customers (recipients)

The table depicts the key products processes and measurements. Further details for key products include all the key products made at the strategic partner's facilities using volunteers and workforce support. Hospital: We have a side of the hospital where

we make our meals. MWO senior leaders are involved in the opening processes to prepare key products for delivery and service to customers (recipients). Finally, in the last portion of the process, volunteers meet at the strategic partner's site to be assigned their route and strategic direction for the day.

Determining Key Support Processes. MWO's leadership lacks an extensive workforce to support key support processes. Furthermore, the organization has a small workforce with a limited overlap of responsibilities and duties. Due to this, MWO's leadership has ensured that the information provided to the workforce is accurate and correct to support operational processes. Additionally, MWO's leadership offered that much of its support comes from members of its voluntary workforce who provide support in all operational areas. MWO's leadership has supplied intensive details into the key support processes through direct oversight of volunteers and meal routes and use of the systems and technology where applicable.

Improving and Supporting Work Processes for Product and Process. MWO's leadership has created a continuous improvement culture to support work processes for product and process. The organization's leadership has identified metrics and targets for each operational plan for tracking and reporting purposes. MWO's leaders use these reported metrics along with the feedback from the 30, 60, and 90-day surveys to identify process and performance improvement opportunities. In addition, the leaders engage with stakeholder groups to obtain feedback on improvement areas for the organization's work processes and products. MWO's leaders and workforce have embodied the mantra

‘delighted but never satisfied’ to foster a mindset of continuous improvement of work processes for product and process.

Managing Supply Network. MWO’s leadership must effectively and efficiently manage its supply network because of the dependency on community partnerships. MWO’s leadership used to have two contract kitchens as a means for a backup network to eliminate any disruption in operations. After the executive director completed a cost analysis of the supply network, it was decided to invest heavily in the partnership with the local hospital to manage the organization’s supply network. This partnership has allowed the organization to operate in a cloud-based technology environment and use an inventory management system to manage its supplies. Lastly, MWO’s leadership has committed to ongoing supply network management through scenario-changing analysis, which involves creating scenarios for the use and exhaustion of supplies to monitor supply requirements and sustain business operations.

Pursuing Innovation Opportunities. MWO’s leadership is in constant pursuit of opportunities for innovation. One way that has been identified by leadership is through the use of technology for operational needs. The executive director has implemented the use of a new email server and internal drives to enhance the functionality of organizational technology and enhancement of work processes. Furthermore, MWO’s leadership actively engages in their partnerships and stakeholder groups by requesting suggestions and feedback on current innovative technology used within their organization, which MWO’s workforce can duplicate. Through effective due diligence

and thinking outside of normal operations helps the organization's leadership pursue innovative opportunities.

Operational Effectiveness

In this section, I describe how MWO's leadership ensures the effective management of their operations by reviewing their processes of cost management, efficiency, and operational effectiveness; the security, including cybersecurity, of sensitive and privileged information and data assets; a safe operating environment; and organizational preparedness for disasters and emergencies.

Managing the Cost, Efficiency, and Effectiveness of Operations. MWO's leadership manages its operations' cost, efficiency, and effectiveness through a partnership site. The organization's leadership manages the cost of its business operations by moving portions of its operations to the partnership site, allowing for efficient and effective resource usage. MWO's leadership purchases products through current partnerships, which has resulted in significant cost savings for the organization. Furthermore, the organization's leaders use the in-kind donation of the onsite facility director's time to help select appropriate products and supplies for the organization's operational needs. Lastly, MWO's leadership use of the onsite facility director has helped manage cost, efficiency, and effectiveness by lowering the cost of operations via salaries, food, supplies, and distribution.

Ensuring the Security of Data, Information, and Key Assets. MWO's leaders have set out to secure data, information, and critical assets through technology. Specifically, the organization receives personal contact information, including the names

and telephone numbers of its customers (recipients), donors, volunteers, and stakeholder groups. Leadership and the workforce are committed to only collecting the minimal required data for its business operations. Furthermore, the organization's leadership and workforce store such data and information in password-protected databases. MWO's leadership protects critical financial and banking data from breaches or losses by storing this data on a third-party vendor site. Internally, the organization's leadership uses firewalls and a local IT vendor to protect the data associated with its employees, including social security numbers and other confidential information. The IT vendor also provides services to the organization for cybersecurity and related protection of its data and assets. MWO's leadership has purchased vehicle, umbrella, and workers' compensation insurance to protect its vital physical assets, including but not limited to equipment, supplies, inventories, and related assets.

Supplying a Safe Operating Environment. MWO's leadership provides a safe operating environment for its business operations and stakeholders through safety protocols and health guidelines provided by health regulators. Given that the organization's leaders and workforce handle food, the rules and food safety protocol are consistently enforced while in the kitchen or facility site. MWO's leadership supplies ongoing training and posted information guidelines for the workforce to maintain a safe operating environment. Furthermore, the organization's leaders work alongside the partner site to emphasize the physical security of using their facilities. MWO's leadership constantly engages with the partner sites' security personnel to sustain a safe and

operational environment for their workforce. MWO's leaders protect and safeguard its business operations and stakeholders by promoting safe and secure working conditions.

Ensuring Organizational Disaster and Emergency Preparedness. MWO's leadership provided organizational disaster and emergency preparedness through scenario planning sessions and what-if analysis. The organization's leaders perform tabletop testing (walk-throughs of disasters or emergencies) of disaster situations to formulate plans for the identified disaster or emergency. Moreover, the leaders developed a disaster recovery plan from these tabletop tests, which are then thoroughly written out in step-by-step detail for all for a codified and communicated response protocol for disasters and emergencies. Within the last three years, MWO's leadership has allocated time to create this disaster recovery plan to move the organization from a state of 'hope' to more of a strategy and plan of action for disasters and emergencies. Lastly, the organization's leaders ensure organizational disaster and emergency preparedness through an annual review of the recovery plan for any modifications needed for operational and logistical purposes.

Measurement, Analysis, and Knowledge Management

Nonprofit organizations that see evaluation and measurement as integral parts of their management frequently include the results in annual reports focused on educating stakeholders (Mayer & Fischer, 2023). The foundation of the Baldrige systems perspective is Measurement, Analysis, and Knowledge Management. Information in this section is critical to effective management and leadership and to a fact-based, knowledge-driven, agile system for improving performance and competitiveness. MWO's leadership

can support its Leadership Triad and the Results Triad by describing Measurement, Analysis, and Knowledge Management processes.

Measurement, Analysis, and Improvement of Organizational Performance

MWO's leaders use data and information for performance measurement, analysis, and review during strategic planning and daily tracking. The leaders use data and information from a client database that identifies metrics and key performance indicators to capture MWO's strategic performance and operational efficiency. MWO's financial and non-financial data, information, and performance indicators (see Table 4) are key metrics in configuring MWO's process management. The executive director analyzes the data and information to measure key strategic objectives against performance results to anticipate and respond to organizational changes as needed.

Table 4*Key Non-Financial and Financial Performance Measures*

	Measures	Frequency
Non-Financial		
	Number of Meals Delivered	Monthly
	Number of Active Customers (Recipients)	Monthly
	Number of People Served	Monthly
	Demographics of who is served	Monthly
	Age Ranges of Customers (Recipients)	Monthly
	Residency Areas	Monthly
	Volunteer workforce donated hours	Monthly
Financial		
	Revenue from individual contributions	Monthly
	Revenue from grants	Monthly
	Revenue from program services	Monthly
	Investment Income	Monthly
	Other Revenue	Monthly
	Budget to Actual Variance - Revenue and Expense	Quarterly
	Cash	Monthly
	Cash Reserves	Quarterly

Performance Measurement. MWO's leadership team identifies metrics and key performance indicators (see Table 4) that help foster specific, measurable, achievable, relevant, and time-bound goals, objectives, and targets. MWO's leaders noted that they semi-annually review the organization's operational and financial data for performance. CO's leadership tracks and reports to the workforce the data on operational and financial activities, including, without limitation, revenues, expenses, budget to actual variances, profitability, and cash and investment balances. MWO's executive director reports this information monthly to the organization's board of directors. MWO's leadership uses a client database as a performance measurement system to track and collect customer data and information (recipients). MWO's leadership ensures its performance measurement system can respond to rapid or unexpected organizational change and provide timely data by recertifying each customer's (recipient's) profile every 12 to 18 months. The

organization's leaders noted that keeping the data updated and accurate allows for timely analysis and the ability to respond rapidly to internal or external changes.

Performance Analysis and Review. MWO's leaders conduct performance management using the 30-60-90-day review process. Beginning with determining this review process's performance metrics and capabilities, the leaders identify strengths, weaknesses, opportunities, and threats beneficial for sustainable operations. MWO's leaders collect data and information about performance to prove the value perceived by the customers (recipients) served. This information is disseminated to program managers to conduct performance analysis. The program managers use a spreadsheet to track and compare responses and metrics against strategic objectives. MWO's leadership then assesses the program managers' data to identify data points that can help tell the story of the work the organization is doing within its local community. Finally, the executive director prepares quarterly reports to review key stakeholder groups and the board of directors to depict the value of MWO's operations and commitment to achieving sustainable competitive performance.

Performance Improvement. MWO's leaders project future performance by performing trend analysis. The organization's leaders analyze the trends of the following metrics: the number of meals delivered, supplies used to prepare the meals, and the health conditions of customers (recipients). MWO's leaders aggregate this data to analyze the trend lines from the graphs and outliers. The executive director performs further analysis to determine whether service areas and product lines are performing well or need improvement. The executive director will report the findings from this review to the

board of directors for further discussion and strategic direction if an organizational change is desired.

Information and Knowledge Management

Data and Information. MWO's leaders have created an organizational culture amongst the workforce that stresses the importance of good data in the system, which will provide valuable results and information. The organization's leaders have used effective lines of communication to reinforce the importance of the data collected and input into the system, providing financial, operational, and organizational performance results used to execute strategic plans and objectives. Furthermore, the organization's leaders have worked with the software developers to design the system to meet the needs and organizational structure of the organization. The system will delineate data based on applied filters and formulas to ensure that data and information are of the highest quality. Finally, MWO's leaders communicate to the workforce consistently, via staff meetings, the 'why' behind the collection of data and information and connect the importance of each workforce member's role within the organization.

Organizational Knowledge. MWO's leaders have relied on the performance systems created, policies, procedures, and a continuous feedback loop between leaders and the workforce to enrich an organizational knowledge database that all can access. MWO's organizational knowledge assets – including explicit, implicit, and tacit organizational knowledge, memory, and records, computer software and programs, licenses, recipes, proprietary assets, and organizational know-how – are essential components of the organizational knowledge database. MWO's leaders share best

practices in the organization by ensuring the entire workforce is trained through their onboarding process. Furthermore, the organization's leaders provide ongoing training in best practices through online training offerings. MWO's leaders have implemented cross-training amongst every position within the workforce to allow the organization a contingency operational plan and sharing of organizational knowledge.

Collection, Analysis, and Preparation of Results

Thematic Findings

The research purpose of this qualitative single case study was to explore the strategies that nonprofit organization leaders use to increase community awareness and capital funding. The research question of this qualitative single case study was for me to query the strategies that nonprofit organization leaders use to increase community awareness to catalyze capital funding. I conducted semistructured interviews using the Zoom software application with three senior executives identified by the MWO client leader and recorded audio files from the interviews. I masked the identities of each participant using the naming convention "IP1" to represent "Interview Participant 1", IP2 designated as Interview Participant 2, and IP3 Interview Participant 3.

I collected data from three MWO senior leaders using semistructured interviews, company documentation, board of directors' meeting minutes, financial statements, strategic objectives and planning documents, policies, procedures, website, YouTube channel, electronic records, and communication. I performed a systematic analysis following an iterative data collection, review, and analysis process. Finally, I used the Baldrige Performance Excellence Program (2021) criteria for performance excellence to

provide a robust understanding of MWO. The thematic findings of this study include uncovering the strategies employed by nonprofit leadership for (a) strategic partnerships, (b) stakeholders and strategic objectives, and (c) funding diversification.

Thematic Finding 1: Strategic Partnerships

Nonprofit organization leaders can increase community awareness and capital funding by executing strategies to (a) establish partnerships in their marketing strategy and (b) grow existing partnerships in their marketing strategy. I extracted this theme from the data analysis of my semistructured interviews, open and informal interviews, and public and private documentary data. The specific documentation used included MWO's annual report, board of directors minutes, and annual strategic objectives document. Nonprofit leader strategies act to increase community awareness and capital funding by adding strategic partnerships or leveraging an existing partnership to the benefit of the organization and financial sustainability. The strategies and associated results are subsequently presented.

The leaders of MWO use a strategic partnership approach to capture stakeholder identity, vested interests, and expectations and influence and organize stakeholders into groups. Interview Participant 1 (IP1) stated that direct communication with strategic partners has garnered financial support for the organization and the donation of volunteers to assist with operational needs. Interview Participant 2 (IP2) highlighted the importance of communication with stakeholder groups to define, understand, and categorize stakeholders according to their stakeholder group, communication needs, and characteristics is vital for strategic partnership. Participant 3 (IP3) noted that creating

lines of communication with strategic partners allows for a constant feedback loop on best practices to further the mission and vision of MWO within their local community.

Partnerships are often based around the intentional and voluntary interactions (linking or sharing of information, resources, activities, and capabilities) between two or more organizations (and the individuals involved) to achieve a common goal or purpose that could not be achieved individually (Eiselein et al., 2023; Wood & Gray, 1991). With business-NPO partnerships, information sharing is important to commitment because it reduces uncertainty and confusion, thereby enhancing coordination and problem-solving (Barroso-Méndez et al., 2020). Collaboration between business-nonprofit partnerships offers the opportunity to reach wider audiences and to have broader access to resources; however, since external stakeholders' interests and expectations may change over time, leaders of the focal nonprofit organization are forced to constantly adapt (Vogel et al., 2022). The MWO case study interview participants identified the local businesses, local churches and church organizations, mission partners and coalitions, colleges and universities, civic authorities and agencies, and donors as key strategic partnerships congruent with data from MWO company documentation.

Lastly, this finding ties to the conceptual framework of stakeholder theory because effective and efficient strategic partnerships are created by nonprofit organization leaders considering the needs and demands of the stakeholders and a wide range of external constituents (Valentinov & Hajdu, 2019). Also, nonprofit organization leaders rely on strong relationships and strategic partnerships to actualize their mission and provide services and operations. Nonprofit organizations should actively seek

partnerships with organizations whose values align with their mission (Yibo, 2023). Furthermore, nonprofit organization leaders can use stakeholder theory as a basis for the fundamental operations of an organization in which stakeholder groups have a stake in the success or failure, similar to strategic partnerships. Strategic partnerships, especially with corporations and influencers, can greatly amplify advocacy and fundraising efforts; these partnerships can extend the reach of advocacy campaigns and attract new donors (Yibo, 2023). For these rationales, nonprofit organization leaders seeking community awareness growth and capital funding can apply stakeholder theory to strategic partnership management to enhance their organizations.

In summation, I identified strategic partnerships as consistent across the various datasets. Identifying, characterizing, categorizing, and classifying partnerships allow leaders to foster stakeholder management strategically. The Baldrige Performance Excellence Program (2021) provides specific sections for identifying different partnerships, their benefits, and their influences on the organization. MWO's directors and leaders properly conduct strategic partnership identification, engagement, and alignment exercises for partnership and stakeholder groups. Correctly grouping partnerships into stakeholders' groups allows for successful strategic stakeholder optimization and relationship building.

Thematic Finding 2: Converting Customers (Recipients) Feedback to Income Opportunities

Nonprofit organization leaders can increase community awareness and capital funding for financial sustainability by executing strategies to convert existing customers' (recipients') feedback into opportunities for other income sources. I extracted this theme

from the data analysis of my semistructured interviews, open and informal interviews, and public and private documentary data. Such nonprofit leader strategies exist to grow and leverage existing customer (recipient) bases into new or renewed opportunities for servicing and creating other income sources. MWO's leadership executed strategies to grow and extract customers' (recipients) feedback through surveys and questionnaires. The strategy and associated results are subsequently presented.

MWO leaders executed strategies to convert customers' (recipients') feedback to income opportunities by creating a feedback loop to analyze program offerings. Specifically, the organization's leaders perform pre-onboarding and post-onboarding interviews with customers (recipients) to determine which programs are successful and what opportunities are present for new income sources. IP1 acknowledged the importance of the data from the interviews because it helps the leaders of MWO create and adjust financial strategic objectives. IP2 added that using the information helps garner financial support and resources from donors by providing them with data on customers (recipients), which is another income opportunity.

The thematic finding of this study related to nonprofit organization leaders converting existing customers' (recipients) feedback to income opportunities for financial sustainability is new knowledge from this research study and did not confirm or disconfirm any peer-reviewed knowledge in the discipline presented in my Review of the Professional and Academic Literature regarding nonprofit organization leaders. This finding is new scholarship because I could not find evidence of similar themes in extant peer-reviewed knowledge in the discipline published before or after I wrote my proposal.

There is little research on converting customer (recipients) feedback to income opportunities at non-501(c)(3) organizations; however, I did not find this research topic in a contemporaneous search of extant research.

Lastly, the thematic finding of this study related to nonprofit organization leaders converting customers' (recipients') feedback to income opportunities for financial sustainability ties to the conceptual framework of stakeholder theory. Using internal and external resources and capabilities through customers' (recipients) feedback is a direct tenet of stakeholder theory via jointness of interest. According to Strand and Freeman (2013), 'jointness of interest' enables organizations to create value by exerting effort to align their interests with the stakeholders' interests (Shah & Guild, 2022). From this rationale, nonprofit organization leaders seeking income opportunities and financial sustainability can apply stakeholder theory to income source management to enhance their organizations.

In summation, my findings and extant literature in the discipline in my Review of the Professional and Academic Literature confirm that nonprofit organization leaders execute strategies to convert customers' (recipients') feedback into income opportunities for financial sustainability. I extracted this theme from the data analysis of my semistructured interviews, open and informal interviews, and public and private documentary data. Specifically, MWO's leadership enacted a successful strategy by creating a feedback loop through pre- and post-onboarding interviews as a data set to garner support from existing and new donors. I confirmed this theme with my conceptual

framework of stakeholder theory and the behaviors expected of nonprofit organization leaders concerning income opportunities as stakeholders' jointness of interest.

Thematic Finding 3: Strategic Stakeholder Communication

Nonprofit organization leaders can increase community awareness and capital funding by executing strategies to communicate with stakeholders consistently and effectively. I extracted this theme from the data analysis of my semistructured interviews, open formal interviews, and public and private documentary data. Communicating with stakeholders consistently enabled MWO's leaders to understand stakeholder needs and vested interests, inform stakeholders of organizational objectives, support strategic, financial, and operational planning, and provide competitive performance.

Communication was a theme that remained consistent across datasets, organizational documentation, stakeholder theory, semistructured interviews, and the Baldrige Performance Excellence program (2021).

Engagement is seen as the dynamic interplay of stakeholder and organizational actions; in other words, engagement is social, relational, and multidimensional and occurs through interaction, exchange, and collaboration between entities (Morehouse & Saffer, 2023). IP1 stated that stakeholder engagement is done through storytelling about the services rendered. IP2 acknowledged that personal engagement with stakeholders lends itself to communication channels between MWO leadership and stakeholders, which builds their relationship. Relationships are conceptualized as the state between an organization and its key public in which the actions of either entity impact the economic, social, political, or cultural well-being of the other entity (Morehouse & Saffer, 2023).

IP3 provided that verbal feedback is given by stakeholders through direct conversations and has effects on repeat donation rates and organizational support. Regardless of whether engagement or a relationship is the antecedent or outcome with stakeholders, the organization is at the center (Yang & Taylor, 2021). Communication has been the linchpin for stakeholder engagement and building and sustaining partnerships.

Business-NPO partnerships in which the partners communicate effectively and share critical and sensitive information will show a higher level of commitment between themselves than business-NPO partnerships that do not exhibit this information-sharing behavior (Barroso-Méndez et al., 2020). NPOs employ marketing strategies not solely to augment the sale of their services or products but also to cultivate enduring relationships with donors, volunteers, and other stakeholders (Werke & Bogale, 2023). The significance of marketing strategy is emphasized as a linchpin for nonprofits to advance their missions, enhance fundraising volunteer relationships, promote social values, and embody organizational principles (Werke & Bogale, 2023). The use of marketing strategies to highlight specific instances where communication of an initiative, activity, event, or program offering engages stakeholders to form a deeper relationship with MWO and further commit to the mission and organizational objectives.

It is worth mentioning the organizational benefit for an NPO to have a website or information portal where it can express different opinions, explain its projects and objectives, make itself known, and thus centralize and disclose relevant information for its stakeholders and its engagement (Ortega-Rodríguez et al., 2022). Stakeholder theory depends on leaders' communicating with stakeholders to build relationships that facilitate

access to information regarding program offerings, volunteer opportunities, events, fundraisers, and strategic initiatives. IP1 acknowledged using the organization's website and social media to inform stakeholders of organizational initiatives and campaign appeals. Sharing information via communication platforms such as websites and social media allowed MWO to reach unidentified and identified stakeholder groups to support MWO's initiatives, activities, programs, and strategic objectives.

In summation, I confirm my findings that nonprofit organization leaders execute strategies to increase community awareness and capital funding by executing strategies to communicate with stakeholders consistently and effectively. I found this theme in the data analysis of my semistructured interviews, open and informal interviews, and public and private documentary data. I confirmed this thematic finding with my conceptual framework of stakeholder theory and in peer-reviewed knowledge in the discipline presented in my Review of the Professional and Academic Literature and new extant research in the discipline published since I wrote my proposal. Therefore, my findings could be significant for nonprofit practitioners, extant literature in the discipline, and confirmation of stakeholder theory in a new application to nonprofit leadership and finance.

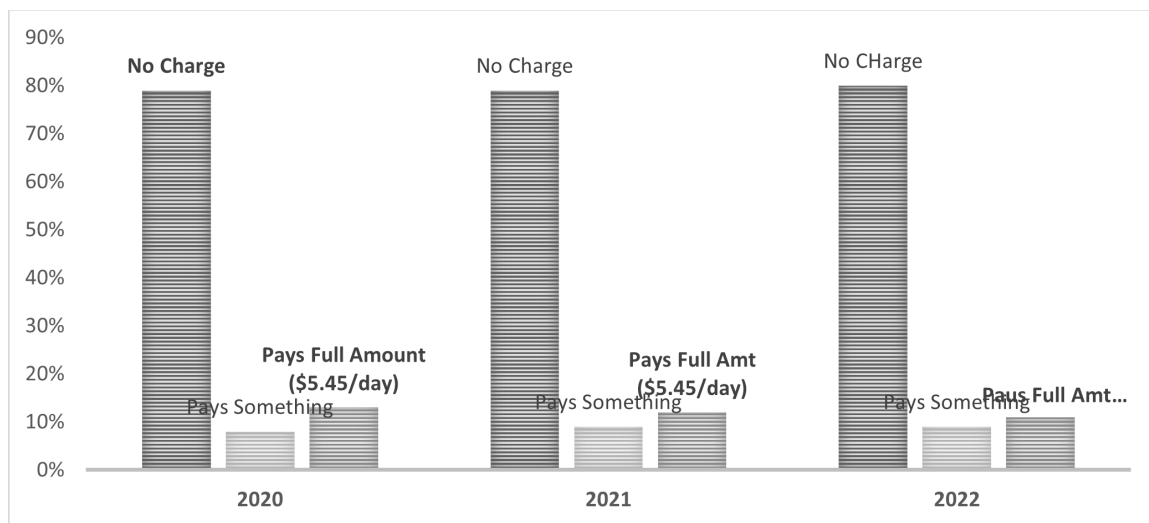
Product and Process Results

MWO leaders, workforce, volunteers, and partners provide programs and service offerings to benefit internal and external stakeholder groups. This is done as a social mission to deliver positive social change and achieve strategic objectives. Comparing MWO's program and services performance between 2020 and 2022, MWO's program

and service delivered significant performance. MWO’s workforce has delivered over 139,000 meals to its local community through local partners’ facilities and donated equipment.

Figure 2

MWO Customers (Recipients) Program Fees



MWO has provided program and service offerings to 80% of customers (recipients) at no charge, 9% pay a nominal fee, and 11% pay the total amount, calculated at \$5.45/day.

Figure 2 reflects MWO’s consistency in providing a broad array of programs and services, denoting substantial resources to program and service offerings, and delivering mutually beneficial stakeholder satisfaction.

Table 5

MWO Total Products Delivered

	2020	2021	2022
Home Delivered Meals	111,918	124,288	134,401
Blizzard Box Meals	4,250	2,000	2,375
Ensure Delivered	2,020	3,650	2,950
Animals Served	42	84	67

MWO's program also includes service to the animals to benefit their customers (recipients). MWO's workforce delivered 42, 84, and 67 meals to their customer's (recipients) animals from 2020 to 2022 (see Table 5). Another product and process that MWO offers is emergency and safety calls made to customers (recipients) as welfare check-ins. MWO's leaders see a positive correlation between the customers who receive products and services and emergency and safety calls. The executive director uses this information to update the board of directors and key stakeholders on products and processes rendered by MWO.

Customer Results

Customers (recipients) are actual and potential beneficiaries of MWO's products, programs, and services. MWO's leaders identify their local communities, donors, regulators, auditors, investment advisors, bankers, vendors, suppliers, and staff as customers. MWO's board of directors and internal and external stakeholder groups are also key customers. MWO depends on board members for guidance, expertise, monitoring, and fundraising. Defining and identifying customers is essential to understanding whose interests are attended to and targeted by MWO leaders. MWO's leaders measure and report stakeholder satisfaction metrics using the age range chart.

Table 6*MWO Customers (Recipients) Demographics*

	2020	2021	2022
Male	39%	38%	40%
Female	61%	62%	60%
African-American	27%	28%	27%
Caucasian	71%	70%	72%
Other	2%	2%	1%

Table 6 displays statistical data of MWO's customers (recipients). The primary beneficiaries of MWO's program and service offerings are the age group of 76+ and the community (see Table 6) who directly benefit from MWO's program and service offerings.

Table 7*MWO Customers (Recipients) Satisfaction Measures*

	2020	2021	2022
Emergency Calls/Safety Calls Made	763	1,536	4,014
Total Incoming Applications	421	426	247
New Routes Created	9	4	0

MWO's leaders measure customer satisfaction, identify opportunities to improve programs and services, and find avenues to close gaps by incorporating feedback into the functional and operational plans (see Table 7). Customer results include the number of emergency/safety calls by volunteers who noticed something was amiss with customers (recipients). The use of this information provides MWO's leaders the opportunity to analyze customer satisfaction and provide stakeholders with performance metrics.

Workforce Results

The nonprofit sector represents a significant proportion of the economy and workforce: around 5% and 8% of gross domestic product (GDP) in countries like the United States, Canada, Israel, Australia, and Japan (Casey, 2016). MWO's workforce comprises an executive director who manages the organization's operations and collaborates with the board of directors and an internal staff (personnel) team that oversees the volunteers who support the delivery of MWO's program and service objectives (see Figure 3). Volunteers include community members, youth leaders, and other professionals who lend their expertise and time to support the delivery of MWO's programs and services to the community and partnerships. MWO also uses its strategic partnerships to support the preparation of meals by the volunteers before delivery. Finally, MWO employs the services of civic officers, including police officers, social workers, and civil servants.

Figure 3

MWO Workforce and Community Partnerships



MWO also monitors interesting statistics of their workforce that contribute to and support operations and activities. The executive director tracks these statistics for workforce performance metrics (see Table 8) and reports the results regularly to the board of directors to support the planning and execution of strategic objectives. Workforce performance expectations are periodically communicated with the workforce through monthly one-to-one meetings that their direct supervisor conducts. These shared expectations align with MWO’s performance expectations and stakeholder-led objectives.

Table 8

MWO Customers (Recipients) Other Interesting Statistics

	2020	2021	2022
Received Regular (Heart & Diabetic Friendly) Meals	83%	75%	64%
Recipients with Special Diets	17%	25%	36%
Supper Recipients	27	45	0

Leadership and Governance Results

MWO has an executive director and an eighteen-member board of directors that comprise MWO's senior leadership. The executive director manages MWO's daily tasks and reports to the board of directors. MWO's leadership is also comprised of middle-level management who communicate in person, by telephone, teleconference, or email. Effective and direct communication has been the key to competitive performance, along with a culture of honesty and transparency at each level within the workforce. Creating such a culture has garnered trust and commitment in MWO's leadership direction toward achieving strategic and financial objectives. List the overarching research question.

MWO is one of the 688,672 IRS-registered 501(c)(3)s in the mid-Atlantic region of the United States, exempt from federal income tax, as a private foundation. The IRS defines a 501(c)(3) organization under section 501(c)(3) of Title 26 of the United States Code. Under the IRS 501(c) code, there are two types of nonprofit organizations in the United States exempt from federal income tax; a 501(c)(3) is either a private foundation receiving most of its income from investments and endowments or not a private foundation, receiving a substantial part of its income directly or indirectly, from the public or the government. MWO receives most of its income from contributions, gifts, and grants. MWO is required to file as IRS Form 990 or 990-EZ. MWO has a board of directors who review annually written policies and procedures, written document retention and destruction policies, conflict of interest policies, and the board-approved handbook. MWO leaders and workforce comply with all applicable labor and state laws.

The executive director ensures compliance with federal and state regulations by engaging an annual financial statement audit by an independent firm to foster an audit opinion on the financial statements. Upon completion of the financial statement audit, a presentation is given to the governance, which is comprised of the board of directors. Meetings, engagements, and communications of the board of directors or any board committee authorized to act in its capacity are contemporaneously documented and recorded. MWO makes the following documentation available to the public: information about its operations via annual reports, financials, Form 990s, recipient demographics, programs, and services administered.

Financial and Market Results

The purpose of this study was to explore strategies some NPO leaders can use to increase community awareness and capital funding. MWO's leaders identified financial sustainability as a key financial objective of MWO's operations, providing the resources to offer their program services to the community. In the US, the IRS requires certain data, such as basic financial indicators, to be reported by many nonprofits (Mayer & Fischer, 2023). Mayer and Fischer (2023) further stated that, unsurprisingly, information on expenses (on programs and operations) is the most common type of data collected (over 90%) among nonprofit organizations. MWO's leadership gauges financial and market results through basic financial indicators, including revenues vs expenses, contributed revenue, and change in net assets analysis.

Table 9*MWO Annual Revenue, Expenses, and Net Assets Balances: 2020-2022*

Item	2020 (US\$)	2021 (US\$)	2022 (US\$)
Annual Revenue	1,677,934	1,400,393	1,328,513
Expenses	854,354	995,369	1,111,129
Net Assets or Fund Balances	4,196,114	5,464,371	5,196,453

Table 9 presents a chart of the organization's annual revenues, expenses, and net assets or fund balances from 2020 to 2022. MWO's revenues decreased slightly between 2020 and 2022, during which time the organization suffered a decline in services because of COVID-19 restrictions and mandatory shutdowns. However, the change in net assets between 2020 and 2022 increased in terms of dollars and percentage of revenues, highlighting the organization's improved overall financial position through the difficult years of COVID-19. MWO's leaders felt that despite the challenges and restrictions, their ability to generate enough revenue to support their services and manage expenses propelled the organization to remain financially solvent and build toward sustainability.

Table 10*MWO Financial Performance Results: 2020-2022*

Item	2020 (US\$)	2021 (US\$)	2022 (US\$)
Contributions and grants	1,509,547	1,100,834	1,049,931
Program services revenue	71,207	92,309	93,187
Investment Income	72,162	183,552	146,176
Other revenue	25,018	23,698	39,219
Total revenue	1,677,934	1,400,393	1,328,513
Grants and similar amounts paid	-	-	-
Salaries, other compensations, and employee benefits	357,710	413,917	543,724
Other expenses	496,644	581,452	567,405
Total expenses	854,354	995,369	1,111,129
Revenue less expenses (Net income)	823,580	405,024	217,384

MWO's leaders measure, analyze, and assess financial and market results for capital funding purposes to present this information to donors and key stakeholders. Donors are commonly interested in financial information, such as administrative and program expense ratios and other financial data (Mayer & Fischer, 2023). MWO's financial results and performance from 2020 to 2022 (see Table 10) reflect revenue decreasing at 19.82% from 2020 to 2021 and 5.41% from 2021 to 2022. Furthermore, expenses increased by 14.17 from 2020 to 2021 and 10.42% from 2021 to 2022. Although revenues have been decreasing year over year, the increase in net assets or fund balances proves the organization's financial sustainability when measured by traditional liquidity and solvency measures.

Key Themes

In this section, I present an assessment of the key themes I identified from the thematic analysis of various sources of data; the review of company documentation, academic and professional literature, the stakeholder theory conceptual framework; evidence, findings, results, and details from the Baldrige Excellence Program assessment across the key Baldrige performance excellence scoring dimensions of (a) process strengths, (b) process opportunities, (c) results strengths, and (d) results opportunities.

Collecting qualitative data from MWO company documentation, the Baldrige Excellence Program assessment results, publicly available data, and semistructured interviews with senior leaders of the partner organization, using data triangulation and member checking of data from the interviews to ensure data accuracy, saturation, and quality, I organized and analyzed the data to answer the research question using thematic

analysis. I identified five key themes: (a) strategic partnerships, (b) alignment of stakeholder needs and strategic objectives, (c) strategic stakeholder communication, (d) community engagement, and (e) communication feedback loop between the organization and customers (recipients). On evaluating the key themes against the Baldrige Performance Excellence scoring dimensions—process strengths, process opportunities, results strengths, and results opportunities—I found the key themes congruent with academic and practice literature, professional practice, MWO company documentation, information provided in Section 3 of this study, and findings from the Baldrige Excellence Program assessment.

Process Strengths

Baldrige Performance Excellence Program (2021) referred to “process” as an organizational method used and improved upon. The process used by organization’s leaders to provide products and services. Evaluating an organization’s process requires the assessment of four factors: (a) approach, (b) deployment, (c) learning, and (d) integration. Furthermore, the process assessment is based on a holistic assessment of the overall performance considering the four factors and key themes from data analysis, existing academic and professional literature, or practice. MWO’s leaders use scenario planning and continuous improvement processes to adapt, determine, and deliver programs and services.

Structuring what-if scenario planning and organizing operations and work processes around the results of the scenario planning sessions allows the executive director to use the scenario planning and continuous improvement process to design the

key work process and strategic objectives. MWO's leaders also use scenario planning and continuous improvement processes to approach, deploy, measure, and assess the organizational strategy to align with the key themes. Leveraging MWO's scenario planning and continuous improvement processes allows for learning opportunities for the leaders and communication of observations to key stakeholders. The expeditious use of these observations by MWO leaders fosters a seamless integration into the daily operations processes and procedures.

Another process strength of MWO's leaders' is their way of supporting their community. MWO's leaders have developed specific routes, products, and service offerings directly impacting their local community. MWO's leaders engage with the local community through town halls and community events to obtain valuable feedback on their processes and products. MWO's leaders use the support of their community to learn from feedback and integrate new operational processes or procedures that offer the opportunity to deploy effective programs and service offerings.

Process Opportunities

MWO's scenario planning and continuous improvement process encapsulates the leaders' understanding of the operating environment, organizational culture, stakeholder expectations, processes, and procedures to achieve strategic and mission objectives. MWO's leaders could improve its scenario planning and continuous improvement process by incorporating members of the workforce in the process. MWO's leadership conducts 'what-ifs' scenario planning without the presence and voice of a member of the staff and volunteer workforce. Including workforce members in the process allows a

diversity of thought and perspective on solutions and decisions to meet the strategic objectives. NPO leaders benefit from opportunities to engage the workforce in scenario planning and continuous improvement to optimize the delivery of products and service offerings.

Employee engagement is a “positive, fulfilling, work-related state of mind characterized by vigor, dedication, and absorption (Lemon & Boman, 2022); it is a process opportunity for MWO’s leaders. MWO leaders can incorporate the workforce perspective into scenario planning and continuous improvement processes, which, in turn, will foster employee engagement. Furthermore, MWO leaders can build upon this engagement to further an organization-wide commitment to achieving the strategic objectives. MWO leaders are responsible for meeting the expectations of the key stakeholder groups, which can be achieved through complete buy-in, dedication, and workforce engagement to improve operational and functional outcomes.

Results Strengths

Baldrige Performance Excellence Program (2021) defined results as the outputs and outcomes the organization achieves. Results are underpinned and evaluated by the four factors: (a) levels, (b) trends, (c) comparisons, and (d) integration. These four factors assess how an organization’s leaders manage results, outputs, and outcomes and analyze historical performance and industry trends.

NPOs work with a dual goal of achieving social outcomes and economic sustainability (Kumar et al., 2022; Si Dah et al., 2022). Economic sustainability supports organizations in functioning independently to achieve the public good (Kumar et al.,

2022). MWO leaders track and report results and social outcomes via newsletters, email and social media posting, board meetings, and direct conversations with stakeholder groups. These results allow for economic sustainability through continuous donations from supporters, growth and retention of strategic partnerships, and feedback loops from stakeholder groups.

MWO's leaders' results strengths include a positive trend in home meals delivered (see Table 5). There has been a positive trend in customer results, including an increase in the number of emergency/safety calls by volunteers who noticed something was amiss with customers (recipients) (see Table 7), reflecting MWO's leaders' focus on broadening their impact and process strength of serving their local community. MWO's leaders also had a positive uptick in workforce results through an increased number of volunteers year over year, which allowed the organization to deliver more meals (see Table 5). Finally, though MWO's financial results and performance reflect a revenue decrease from 2020 to 2022 (see Table 10), a positive trend in managing expenses reflects MWO's leader's ability to steward donors' contributions effectively and economically.

Results Opportunities

Although MWO's leaders exhibit strong performance in the results dimension in many areas of the scenario planning and continuous improvement process, there are opportunities for even more impactful performance. The results strengthen the dimension of the key themes related to the measurement of receiving donations and its direct impact on enhancing customers' (recipients') lives. However, MWO's leaders have not

identified a trackable metric or measurement to obtain valuable information on the correlation between service offerings and direct benefit to customers (recipients' health). MWO's leaders could benefit immensely from this data and information to increase capital funding opportunities and key stakeholder relationships.

NPOs have a complex environment as they cater to two different sets of market segments – donors and clients (Kumar et al., 2022). MWO's leaders conveyed opportunities to analyze the outputs of donations and their correlation to the impact of services on customers' (recipients') lives. MWO's leaders can develop measurable outcomes for received donations and their impact on customers (recipients) by identifying specific metrics to track. These measurable outcomes may help MWO's leaders communicate trends in organizational performance to stakeholders to deepen strategic partnerships and stakeholder relationships. Using outputs, outcomes, data, and information about customers (recipients) and the impact organizational services have had on their lives allows for continuous stakeholder engagement and furthering the social and mission-oriented strategic objectives of MWO's leaders.

Project Summary

The purpose of this qualitative single case study was to explore the strategies nonprofit organization leaders use to increase community awareness and capital funding. While working with the assigned client, MWO, I was a scholar consultant in Walden University's DBA consulting capstone. During this study's course and scope, I reviewed internal and external information and documentation of the assigned client MWO. The population of my study consisted of the leadership of a single NPO located in the mid-

Atlantic region of the United States, who have implemented successful community awareness strategies that led to an increase in donations. Due to the size of the organization and its minimal executive leadership, three senior leaders served as the study's population. Despite the unprecedented challenges in the competitive environment over the last decade, particularly in 2019-2020 with the COVID-19 pandemic, MWO's leaders achieved organizational and social objectives.

In this qualitative single case study, I identified three thematic findings through thematic analysis and key results themes from process and results; the first thematic finding is that strategic partnerships are needed in the marketing strategy, and it is imperative to cultivate and grow existing partnerships. The key results for this thematic finding are a positive trend in home meals delivered and using strategic partnerships to prepare and deliver the meals. The second is converting customers' (recipients) feedback into income opportunities, which can be beneficial in creating other income sources. The key result theme for this finding is that MWO offers emergency and safety calls to customers (recipients) as welfare check-ins, resulting in a positive correlation between customers who receive products and services and program fees. The final thematic finding is executing strategies to communicate with stakeholders consistently and effectively; the key process and result is MWO consistently providing a broad array of programs and services, denoting substantial resources to program and service offerings, and delivering mutually beneficial stakeholder satisfaction.

In the results of this qualitative single case study, I represent the viewpoints and perspectives of the participants on strategy, leadership, customers, workforce, operations,

measurement, analysis, and knowledge management, and the performance results of MWO as a nonprofit organization operating a business located in the mid-Atlantic region of the United States. I used data collected from semistructured interviews, a systematic review of existing literature, organizational data sources, and the Baldrige Performance Excellence Program assessment in thematic analysis to answer the research question and explore the strategies some MWO executives use to increase community awareness to catalyze capital funding. Nonprofit organization leaders who study and scrutinize this qualitative single case study will discover at least three thematic findings for usage to increase community awareness of capital funding.

Contributions and Recommendations

I completed my doctoral study research, resulting in several contributions and recommendations for practitioners and scholar researchers. I explored NPO leaders' strategies to increase community awareness to catalyze capital funding. I identified five key themes in Section 3 of this research study, which I summarize again in the next section relating to applications to professional practice. I also identified three themes on nonprofit communication, marketing, finance, and stakeholder theory for usage in the field from the review of the professional and academic literature themes from Section 2 of this research study, which I summarize further in the next section in applications to professional practice. The combination of knowledge and strategies presented with these eight themes are valuable resources for NPO leader practitioners and scholar researchers in the field. Additionally, I uncovered and contributed new knowledge to the field of nonprofit communication, marketing, finance, and stakeholder theory, mainly related to

the strategies nonprofit leaders employ to increase community awareness to catalyze capital funding and apply stakeholder theory to such choices.

Existing academic and professional knowledge suggests various methods, practices, and processes that NPO leaders may use to deliver on stated objectives competitively. These include strategic planning, process improvement, performance management, and strategies such as scenario planning and what-if analysis. Extensive literature and research exist on the benefit of stakeholder theory, the conceptual framework for this study, and its impact on an organization's strategic and competitive performance. The Baldrige Performance Excellence Program (2021) provided a systematic process for evaluating an NPO's key processes, procedures, and practices. However, despite literature and research reflecting that NPO leaders build cross-sector partnerships (CSPs) which are collaborations between organizations from at least two different societal sectors (i.e. business, government, and nonprofit) that work together in the strive for economic, social, and environmental welfare (Vogel et al., 2022), there is limited literature on strategies that NPO leaders use to build and sustain strategic partnerships with their organization's external stakeholders to achieve their organization's strategic and capital funding objectives effectively. I conducted a thematic analysis of existing literature and historical organizational data, member checked responses to semistructured interview questions, performed the Baldrige Performance Excellence Program assessment of the partner organization, and obtained other data to answer the research question and explore strategies that NPO leaders use to increase community awareness to catalyze capital funding,

Application to Professional Practice

My study findings can contribute to professional practice by presenting practices, processes, and strategies that NPO leaders use, key themes identified from existing theory, literature, semistructured interviews, and the Baldrige Performance Excellence Program assessment, and extension of key themes, findings, and results to professional practice to provide NPO leaders with strategies that might assist them with managing stakeholder relationships, and garnering strategic partnerships for competitive performance. In this section, I discuss three thematic findings from the collection, analysis, and preparation of results from Section 3 and five themes from the review of the professional and academic literature themes from Section 2 of this research study.

I presented three thematic findings in collecting, analyzing, and preparing results from Section 3 of this research study. These three thematic findings are as follows:

- Nonprofit organization leaders can increase community awareness and capital funding by executing strategies to (a) establish partnerships in their marketing strategy and (b) grow existing partnerships in their marketing strategy.
- Nonprofit organization leaders can increase community awareness and capital funding for financial sustainability by executing strategies to convert existing customers' (recipients') feedback into opportunities for other income sources.
- Nonprofit organization leaders can increase community awareness and capital funding by executing strategies to communicate with stakeholders consistently and effectively.

These thematic findings of this qualitative single case study could increase the competent practice of nonprofit businesses. For example, Vogel et al. (2022) stated that the people make the partnership, and they do so embedded within their institutionalized environments of the business, government, and nonprofit sectors. Therefore, providing strategies for leaders to engage in effective partnerships and lines of communication is cross-sectional (applicable to all business sectors) and not industry-specific; however, the use of this strategy is relied upon by the makeup of the leadership team. These thematic findings can allow leaders in the global nonprofit industry to increase their organizational community awareness and financial sustainability. Furthermore, nonprofit organization leaders will be responsible for diligently adding workforce bought into their strategic objectives with a willingness to foster strategic partnerships.

Additionally, I presented five results themes in reviewing the professional and academic literature themes from Section 1 of this research study. These five results themes are as follows:

- Nonprofit organization leaders who implement strategies to increase the number of strategic partnerships in their organization's marketing strategy must also be mindful that such strategies could also affect their organizations' resource mix through direct contributions or in-kind donations from the strategic partnerships, which can impact financial sustainability.
- The alignment of stakeholder needs and strategic objectives of nonprofit organization leaders is similar to the for-profit sector because nonprofit organization leaders are interested in the specific needs of their stakeholders, as

do for-profit business leaders when creating and implementing strategic objectives.

- Nonprofit organization leaders often use strategic stakeholder communication to foster awareness of their product and service offerings to advance the organization's mission and vision.
- The application of stakeholder theory by nonprofit organization leaders in administering their organization's marketing strategy can be more fitting than other theories because stakeholder theory can provide nonprofit organization leaders with practical strategies for community engagement.
- Nonprofit organization leaders who implement communication feedback loops between the organization and customers (recipients) must be mindful that such strategies could also affect their organization's brand positively and negatively in the community, directly impacting their community awareness.

These five results themes from my synthesis of relevant academic literature in relation to my conceptual lens of stakeholder theory and research topic of nonprofit marketing and finance allowed me to accentuate my exploration and discovery of how nonprofit organization leaders increase community awareness to catalyze capital funding when operations have a balance of partnerships and effective communication strategies. These five results' themes are additive to my three previously presented thematic findings. The study findings and results extend the theory to research the business problem, which may be relevant to the partner NPO and nonprofit and for-profit

organizations worldwide to improve their organizations' community awareness and capital funding.

Implications for Social Change

Positive social change involves the initiative that changes thinking, behavior, relationships, institutions, and society (Stephan et al., 2016). The findings of this study could positively change business practice by identifying strategies that enable leaders to establish relationships with stakeholders to increase revenue through private and corporate donations, which can directly impact their organizations, institutions, communities, cultures, and society. Strengthening communities by building social capital, providing representation for the disenfranchised, and employment, NPOs are not in business to make money but to serve their stakeholders using revenue from private donations or federal awards (Samad et al., 2017; Sprague, 2019). By strengthening the interface with their local communities to create mission awareness to increase revenues, leaders could achieve tangible methods to improve the individuals, communities, organizations, and societies they serve.

Organization leaders who engage in community activities raise awareness of their mission and enhance their community profile (Browning et al., 2020). Once scholars disseminate the results of this study, the influence can extend beyond the single case as other NPO leaders use or adapt the findings to develop strategies to increase donations to sustain their organizations, thus perpetuating or increasing the ability of NPOs to provide services, goods, and resources to those in need. However, this study's implications for positive social change extend beyond the business environment to benefit individuals and

families needing specialized services. By enhancing community awareness of mission-related activities, NPO leaders have the potential to serve more individuals in need who previously were unaware of service availability.

Recommendations for Action

In this qualitative single case study, I aimed to explore the strategies that some NPO leaders use to increase community awareness to catalyze capital funding. The study findings and results included five key process and results themes: (a) strategic partnerships, (b) alignment of stakeholder needs and strategic objectives, (c) strategic stakeholder communication, (d) community engagement, and (e) communication feedback loop between the organization and customers (recipients) that identify a strategic approach to partnerships and communication with stakeholders. I recommend that all nonprofit organization leaders, practitioners, and academics, whether in public or private capacities of funding or monitoring nonprofit organizations, should pay attention to, scrutinize, and act upon the findings and results of this qualitative single case study. The findings and results of this study can provide context and help understand the delicate balance of managing strategic partnerships and stakeholder communication of nonprofit organization leaders to be used for increasing the organization's marketing efforts.

Furthermore, many nonprofit academics and practitioners could be more aligned with the resource needs (i.e., workforce, financial, marketing, partnerships, etc.) of nonprofit organization leaders, particularly those leaders at smaller organizations, to maintain and sustain their organizations in good and bad economic conceptions. Such

action may forge an alignment between members of the professional and academic nonprofit community, nonprofit industry constituents, and nonprofit organization leaders to maximize the cooperation of all parties and further apply this study and its findings to nonprofit professional practice.

The results and findings of this qualitative single study could be disseminated across academic literature, conferences, and training via members of the professional and academic nonprofit community. The benefit of the results and findings of this study can be applied to nonprofit marketing and finance academic literature. The results and findings of this study could also be beneficial for dissemination to nonprofit practitioners at conferences and training related to nonprofit operations and financial management. I recommend disseminating the results and findings of this study because of their usefulness and practicability to the professional and academic nonprofit community.

Recommendations for Further Research

I exhibited strength in this qualitative single case study in its comprehensive literature review on stakeholder theory, its conceptual framework, and nonprofit marketing and finance, its research topic, and three thematic findings distilled from an exploration of this study's phenomenon on the strategies that nonprofit organization leaders deploy to increase community awareness for capital funding. I also exhibited limitations in this qualitative single case study. The limitations of a study are those characteristics of design or methodology that impacted or influenced the interpretation of the findings from your research (Price & Murnan, 2004; Theofanidis & Fountouki, 2018). The first limitation of this study was the small pool of participants, which potentially

limited the generalizability of the study results and conclusions to further application.

The second limitation was focusing on one specific nonprofit organization in a defined geographic area, potentially limiting overall data collection. The third limitation was participant sample size, potentially limiting the transferability of study results to nonprofit organizations of comparable size.

My first recommendation for further research is to expand this qualitative single case study into a qualitative multiple case study of the strategies several nonprofit organization leaders use to increase community awareness and capital funding. Such an approach would lessen the likelihood of the three named limitations of this study and, most importantly, improve the transferability of any findings. My second recommendation for further research is to use quantitative data, research methods, design, and data collection and analysis techniques to expand this qualitative single case study, which may allow empirical assessment of the correlation between stakeholder relationships and capital funding efficiency. My final recommendation for further research is extending the research to other industry sections to include for-profit organizations, governmental agencies, or NPOs in different geographical locations to allow for a broader, richer understanding of the results and findings.

Reflections

My doctoral journey at Walden University has been an opportunity for personal and professional growth through a rigorous academic program and research requirements. I entered the DBA program with sufficient knowledge about nonprofit marketing, finance, executive management, and operations. This knowledge was attained from my

undergrad and graduate degrees in finance and accounting. I have worked in finance and accounting staff, middle-level management, director, and executive management positions. The educational and professional business acumen helped me eagerly prepare to further my academic journey through the DBA program. However, I did not fully anticipate the challenge of proactively managing being a divorced co-parent, responsibilities as an executive leader within an organization, teaching graduate and undergraduate accounting courses at two colleges, and volunteering my time, resources, and expertise at several nonprofit organizations while trying to complete the DBA program.

Although I have no prior experience working with MWO, my professional and academic experience working in the nonprofit sector and stakeholder management roles exposed me to my selected research topic and conceptual framework, offering the potential for researcher bias. I gathered data from multiple sources to reduce the potential for researcher bias. I used various methods, such as triangulating data from multiple sources, developing interview protocols, and establishing a member-checking process with participants. The data gathered from the sample of four participants might not be sufficient to reach data saturation, so I selected a set of application tools for communication that included Zoom. Furthermore, participants in Walden University's DBA consulting capstone program are equipped with resources to limit research bias by understanding the ethical responsibilities governed by their DBA research agreement and IRB research approval and the exposure to principles and applications of the *Belmont Report*. Finally, the structure and framework of the 2021-2022 Baldrige Performance

Excellence Framework required in the consulting capstone program fostered a means by which I could operate methodically through my research and further mitigate the potential for bias with my research and results.

Conclusion

There has been a rapid proliferation of Nonprofit Organizations across diverse industries and nations (Hersberger-Langloh, 2022; Werke & Bogale, 2023), which has intensified competition, led to challenges with declines in direct donations and diminished government and public support in the sector (Piatak & Pettijohn, 2021; Werke & Bogale, 2023); in response to these difficulties, the sector leaders find themselves compelled to adopt a market-driven strategy to surpass competitors (Hopkins et al., 2014; Werke & Bogale, 2023). Nonprofit organization leaders are tasked with adopting strategies to boost their awareness within their local community to generate capital funding. Applying marketing strategies has various advantages for nonprofit organizations, such as improving the performance of fundraising, attracting volunteers, and supporting nonprofits in creating a strong public image in their community (Huang & Ku, 2016; Lee et al., 2018; Liu et al., 2018; Sanzo et al., 2015; Taylor & Miller-Stevens, 2019; Werke & Bogale, 2023). Accordingly, I explored nonprofit organization leaders' strategies to increase community awareness for capital funding in this qualitative single case study.

Having a favorable public image attracts the interest of potential stakeholders, which may eventually lead to an increase in demand for nonprofit services (Werke & Bogale, 2023). From this research study, I uncovered thematic findings and strategies that

nonprofit organization leaders can use when they lack strategies to increase community awareness for capital funding. The findings, results, and recommendations from the qualitative single case study, literature review of existing academic and professional literature, Baldrige Performance Excellence Program assessment, and thematic analysis of research data I collected revealed that NPO leaders who employ stakeholder partnerships and relationship management strategies to sustain relationships with their organization's internal and external stakeholders, achieve heightening the organization's visibility in the community and capital funding objectives effectively.

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Appendix A: Interview Protocol

Semistructured Interview Protocol

Interview Title: Exploring Strategies Leaders of Nonprofits Use to Increase Community Awareness and Capital Funding

1. Introduction of the interview protocols and establishing a comfortable interview environment
 2. Introduce myself to the participant.
 3. Provide my thanks to the participant for taking part in my study.
 4. Explain their withdrawal options from the study, including record destruction.
 5. Notify the participant of anonymity and the usage of the participant's pseudonym.
 6. Verify receipt and response to the Consent Form for Senior Leader Review.
 7. Explain the process for member checking.
 8. Notify the participant of the conversation recording and transcription
 9. Verify and inquire about any questions the participant may have.
 10. Begin the interview questions.
 11. Allow the opportunity for related-probing questions as needed
 12. Complete the asking of interview questions
 13. Provide my thanks to the participant for taking part in my study
 14. Notify the participant of the option to provide any follow-up or follow-up through questions to be sent to me via email.
 15. End the interview protocol.
-

Appendix B: Service Order Agreement

Project Proposal

This Project Proposal has been drafted by [STUDENT NAME] for [COMPANY NAME] and is dated [DATE].

Scope of Work

- [describe internship expectations and outcomes/deliverables]

Work Phase	Estimated Time Required
Online interactions:	
Outcomes/Deliverables:	
Additional Services Provided if Requested:	
Total	

Services Summary	Length of Engagement

Terms of confidentiality and compliance:

In all reports (including drafts shared with peers and faculty members), the student is required to maintain confidentiality by removing names and key pieces of information that might disclose an Institution's/individual's identity or inappropriately divulge proprietary details. If the Institution itself wishes to publicize the findings of this project, that is the Institution's judgment call.

The student will publish the case study in ProQuest as a doctoral capstone (with site and participant identifiers withheld). The case study will be based upon interviews with non-vulnerable adults on the topic of the Institution's business operations, review of public records, and review of internal records/documents related to the Institution's operations that the Institution deems appropriate for sharing with the student.

The doctoral student will not use these data for any purpose other than the project outlined in this agreement.

Interview recordings and full transcripts will be shared with any interviewee (upon request), and the doctoral student will provide opportunities for clarifying previous statements. Transcripts with identifiers redacted may be shared with the doctoral student's university faculty, peer advisors, and site leadership (upon request).

The doctoral student is responsible for understanding and complying with all of the Institution's policies and regulatory requirements.

Ethical Conduct in this Consulting Relationship

The Code of Conduct in the Walden University Student Handbook and the ethical requirements for IRB compliance described in the Manual for the DBA Consulting Capstone bind DBA students in the consulting capstone.

Also, DBA students are required to uphold professional principles in fulfilling their roles as consultants and coaches to client organizations. Beyond the confidentiality requirements outlined above, three principles are key to ensuring ethical conduct in consulting relationships.

Principle 1: Protect the integrity of Walden University

- Not representing conflicting or competing interests or positioning themselves such that their interest may be in conflict or may be perceived to be in conflict with the purposes and values of Walden University
- Not intentionally communicating false or misleading information that may compromise the integrity of Walden University and of the consulting capstone experience

Principle 2: Exhibit professional conduct at all times

- Respecting the climate, culture, values, and regulatory requirements of client organizations and client workforce members

Principle 3: Protect the promise of confidentiality

- Not using or adapting the client organization’s data and information after the capstone experience, unless the information has been publicly shared by the client
- Not conducting telephone conferences with the client organization in public places where information may be overheard

This Project Proposal has been approved by [NAME]:

SIGNATURE

The terms of this Project Proposal have been agreed to by [STUDENT’S NAME]:

SIGNATURE

Updated July 2021