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Crafting a Succession Process for a Nonprofit Organization: Exploring and Plotting the Creation of a Succession Plan for the Chips Montgomery Foundation

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This is to certify that the doctoral study by

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

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MS, University of Tennessee, 2004

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Professional Administrative Study Submitted in Partial Fulfillment

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Abstract

In this case study, the phenomena of leadership loss and transition within a small nonprofit organization, which is a pivotal cycle impacting businesses of all sizes and types, was explored. The study underscored that employee turnover is an inevitable occurrence, influenced by a myriad of factors, leading to significant decisions on staff replacement and thereby shaping future organizational trajectories. Central to this investigation was the exploration of various organizational development theories, functionalism, and human resource planning, which provided a conceptual framework for understanding leadership transitions. Both for-profit and nonprofit entities grapple with leadership losses, yet nonprofits encounter distinct challenges necessitated by their unique operational size and staffing characteristics. This study specifically focused on a small nonprofit organization that was challenged by the departure of a long-serving leader. Through a comprehensive approach soliciting questionnaire feedback from staff, the organizational board, and patrons, the study aimed to offer insightful succession planning recommendations that are intended to address the immediate leadership void and equip the organization for future leadership changes. By integrating feedback from critical stakeholders, a succession planning strategy was crafted that was tailored to the nonprofit's specific needs, ensuring that the organization remains resilient and adaptive in the face of leadership transitions. This case study contributes to positive social change on nonprofit management and succession planning, offering valuable lessons on navigating leadership changes with strategic foresight and stakeholder engagement.

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Dedication

       This study and the entire process are dedicated to all my family and friends who have stood with me throughout this journey. I want to particularly dedicate this work to my great-grandfather and grandfather, Robert Allen King Sr. and Robert Allen King Jr.

Acknowledgments

I would like to express my gratitude to Dr. Michael Brewer and Dr. Chris Spoons for their watchful eyes throughout the process. I also want to acknowledge the unwavering support of my partner, my kids, and my family. Special thanks go to Dr. DeParis for providing support and guidance at the beginning of this journey.

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Section 1: Introduction

Introduction

Succession planning is a pivotal strategic decision for any organization offering an intentional roadmap for its future trajectory. Originating predominantly within the for-profit business sector, the formulation of a succession plan has evolved into an essential organizational management tool (Armstrong & Brown, 2019). Succession planning involves designing an intentional and organized approach to managing change in the leadership of a group by providing continuous development and advancement for organizational prospects (Rothwell, 2011, p. 6). As succession planning has gained predominance in facilitating seamless leadership transitions within for-profit organizations, it has led to many scholarly studies on the process (e.g., Beatty & Zajac, 1987; Kesner & Dalton, 1994; Kesner & Sebora, 1994).

Although the early discourse on succession planning predominantly focused on for-profit organizations, it is noteworthy that there are transferable management practices that extend to nonprofit organizations. Froelich et al. (2011) warned that a worker shortage is on the horizon that will really challenge organizational continuity. This warning marks the framework for an administrative gap in an influential nonprofit organization that serves an essential role in communities like Champaign/Urbana, Illinois. In succession planning, there are steps that an organization takes in planning for future change in the organization (Rosenwald, 2011; Santora et al., 2015; Wolfred, 2008). These steps are unique to each organization and the context of the organization in the

community where the organization operates. The challenges a nonprofit organization faces in succession planning mirror those of for-profit organizations.

The Chips Montgomery Foundation (CMF) has maintained stability over the past 20 years, largely attributed to its consistent leadership. With regular programs catering to the community's needs and a small restaurant operating within the CMF premises, the seamless integration of services and business operations reflects years of dedicated leadership and effort. However, the foundation's strong reliance on its leader underscores the imperative need for a recommendation of a robust succession plan that keeps CMF ongoing through a change in leadership event.

Upon the retirement of its longstanding leader, the CMF risks losing invaluable knowledge gained over the years. Stone (1991) described the initial steps of new nonprofit boards and executive directors toward long-term planning to be intentional with selection of staff and volunteers, thinking about the skills they bring and how their transition away impacts the organization. Stone explained the challenges of nonprofits hiring and planning beyond the hire while succinctly describing many of the long- and short-term challenges of the CMF. Recognizing the challenges that arise when organizational transition occurs, the CMF staff are keen on strategically navigating this transition by considering options, such as formulating a comprehensive succession plan that entails both selecting a leader and/or developing future leaders that would be candidates if a transition occurs.

Organizations consistently contemplate future staffing and development needs beyond their current state. In nonprofit organizations, the boards of trustees play a pivotal

role, significantly influencing succession planning (Freiwirth et. al., 2017; Varhegyi & Jepsen, 2017). Boards are instrumental in driving organizational success and overseeing change initiatives. According to Varhegyi and Jepsen (2017), there are numerous factors that impact the organization, often leaving limited time for comprehensive succession. An organizational succession plan serves as a strategic tool that serves as a planful approach to transition. Providing a succession recommendation would enable CMF to make intentional decisions regarding executive leadership and the direction of organizational development. In their current leadership transition moment, much of the CMF's institutional knowledge was internal to the transitioning, long-standing leader. Capturing the business practices and perspectives needed to form a well-thought-out succession plan recommendation to manage the foundation going forward will be essential to the organization's continued success.

Organization Background and Problem Statement

The CMF faces a significant leadership transition with the departure of its longstanding leader and the introduction of a new leader of the organization. This transition provides an opportunity for the CMF to determine critical characteristics for its future leadership. In this study, I produced a recommendation for a succession plan that is unique to CMF. By implementing a clear succession plan, the organization can mitigate potential transition issues that may undermine its operations and services in its ongoing community work (Rothwell, 2011). Furthermore, a well-defined succession plan may strengthen the capacity of the CMF to provide programs and services effectively in the future.

Every organization experiences a leadership transition. The CMF is a nonprofit grassroots organization dedicated to advancing social and economic justice through arts, spirituality, and community engagement. Functioning within a Unitarian Universalist Congregation framework, the organization emphasizes social justice tenets. In this study I sought to recommend a succession plan to ensure the continuity of the CMF mission and objectives following a leadership transition in the future. My recommendation for succession provides an understanding of the stakeholders' perspectives on leadership and the organization as well as options for CMF to decide what would best fit the organization.

Purpose

The purpose of this professional administrative study (PAS) was to explore and gather the perspectives of CMF stakeholders, including board members, staff, and patrons, with the aim of developing a leadership succession planning recommendation. Given the limited research focused on the organizational transitions of small nonprofit organizations, in this study I gathered organizational understanding to prepare a recommendation in advance of any transition involving leaders with CMF.

This study of a small nonprofit community organization, serving as an outlet for the voice of community organizing, contributes to the growing body of literature in the field. I conducted this study to recommend a succession planning strategy for the CMF that emphasizes cultural variables identified by the CMF staff, board of directors, and patrons as critical to the organization and underscoring its significance given the foundation's pivotal role in community organizing and development in the local

community. Furthermore, the study findings offer an understanding of the internal dynamics of a multifaceted nonprofit organization experiencing a significant leadership transition. By spotlighting the CMF, I highlight vital organizational factors crucial for future leadership continuity and present actionable recommendations with possible applicability to similar multifaceted nonprofit foundations.

Summary of Data Sources and Analysis

The data for this PAS were derived from an in-depth examination of the CMF organization. According to Li (2019), inquisitive information gathering through questioning and discovery are the best approaches to understanding the complexities of an organization (p. 345). I gathered rich data from voluntary participants willing to share their experiences through use of a structured case study protocol. Tellis (1997) stated that the case study unit of analysis tends to be the system or unit that is being studied (in the case of this study, the people of CMF). Consequently, insights gleaned from CMF employees, volunteers, and community visitors informed the qualitative perspective used to identify the CMF culture and craft the final recommendation for a succession plan. The data collection process encompassed seeking archival information about CMF, employing a questionnaire, and asking any necessary follow-up questions of various participants.

Definitions

Replacement planning: The proactive identification and preparation of individuals capable of assuming specific roles within an organization to ensure continuity in operations and leadership (Rothwell, 2011).

Succession planning: the systematic process of preparing individuals, selected either internally or externally, to assume key roles within an organization; the creation of a leadership selection process (Vito, 2018).

Talent management: The strategic planning and development of organizational staff identified as future leaders or considered talented individuals in the organization (Ansar & Baloch, 2018).

Significance

Potential Implications

While numerous studies have examined the organizational structure of nonprofit organizations, further research was necessary to delve into the intricacies of succession planning within nonprofit community organizations that serve as an outlet for the voice of community organizing. Particularly, research is needed that looks into how small nonprofit organizations decide which leadership replacement steps to take. Such decisions could involve considering external or internal leaders to assume the leadership role (Wolfe, 1996).

Key Stakeholders

The key stakeholders in this study were the executive team, volunteer board members, and constituents of a small nonprofit organization dedicated to serving the local community.

Potential Contributions

The study findings offered insights into the operational dynamics of a multifaceted nonprofit. With these findings, the nonprofit audience gain a glimpse into

the work of a small nonprofit organization experiencing a significant leadership transition. The findings can help the nonprofit audience develop an understanding of the unique challenges faced by CMG as they make this transition and the similarities the audience may have with CMF.

Summary

Organizational evolution and transition are inevitable facets of organizational dynamics. The manner in which organizations navigate these changes, particularly in developing requisite leadership, significantly influences their success trajectory (Armstrong & Brown, 2019). While leadership transitions within nonprofit organizations can manifest as either deliberate and strategic or spontaneous and unplanned, evidence has suggested that both for-profit and nonprofit entities reap substantial benefits from structured succession planning processes (Edwards, 2018).

In this initial section, I introduced the current case study conducted to develop a nonprofit organization succession plan, delineating the study's objectives and its potential implications for the broader nonprofit community. In subsequent sections, I will delve deeper into the historical context of succession planning, elucidating the approach used to examine CMF, a small nonprofit organization during the transition of a longstanding leader, in this study.

Section 2: Conceptual Framework and Relevant Literature

Introduction

Nonprofit organizations frequently confront the escalating challenges of leadership change and turnover. The issue of leadership turnover permeates organizations across sectors, be it for-profit or nonprofit, necessitating proactive measures. For nonprofits, the biggest challenges flow from organizational structure and competing priorities that have grown from years of reduced resources, inadequate staffing, and increased community needs (Santora et al., 2015). The intricacies of leadership transition become specifically pronounced for smaller nonprofit organizations. Nonprofit organizations with smaller staff lose the advantage of a deep internal pool of leadership candidates to groom for future opportunities (Gratton, 2018). Despite distinctions between for-profit and nonprofit sectors, adeptly navigating leadership transition remains pivotal for an organization's sustained viability. In this section, I discuss the literature search strategy and conceptual framework, before presenting a literature review and concluding with a summary.

The CMF, a small nonprofit organization, is currently navigating a significant management transition, necessitating a thorough review of organizational priorities and the formulation of a recommendation for a succession plan for its future leadership. The challenge of crafting a succession process presents critical questions for the future of CMF. Helping CMF plot this future required me to answer the following research question: What are the perceptions and suggestions of the CMF staff and board of

directors concerning the qualities desired in a new leader and the process for leader selection?

Grounding this case study were the foundational concepts of succession planning in nonprofit organizations and organizational leadership transition. To gather their insights and perspectives, I conducted interviews with the following key stakeholders at CMF: four staff members, the board of directors, and available patrons. The interview questions were:

1. How would you describe the culture of the CMF?

2. How would succession planning improve the transition of leadership in the CMG?

3. What tenets of succession planning and organizational management are most applicable to the CMF?

4. What specific variables would be most important in developing a succession plan during the transition of leadership in the CMF?

5. What leadership skills and qualities of a leader are most important to the CMF?

These questions were meant to gather the stakeholder feedback used to form the framework for the succession planning recommendation. A recommendation for succession involves considering multiple variables that are specific and important to the organization (Perrenoud, 2020). Crafting a recommendation for a succession plan necessitated consideration of the perspectives of multiple stakeholders that have interest in CMF. The study findings helped to address CMF's distinct needs by:

1. Determining the leadership qualities CMF desires in a future leader.

2. Defining a tailored succession process that best aligns with CMF.

3. Identifying particular recommendations for training and development to be included in the succession planning.

Figure 1

Conceptual Framework
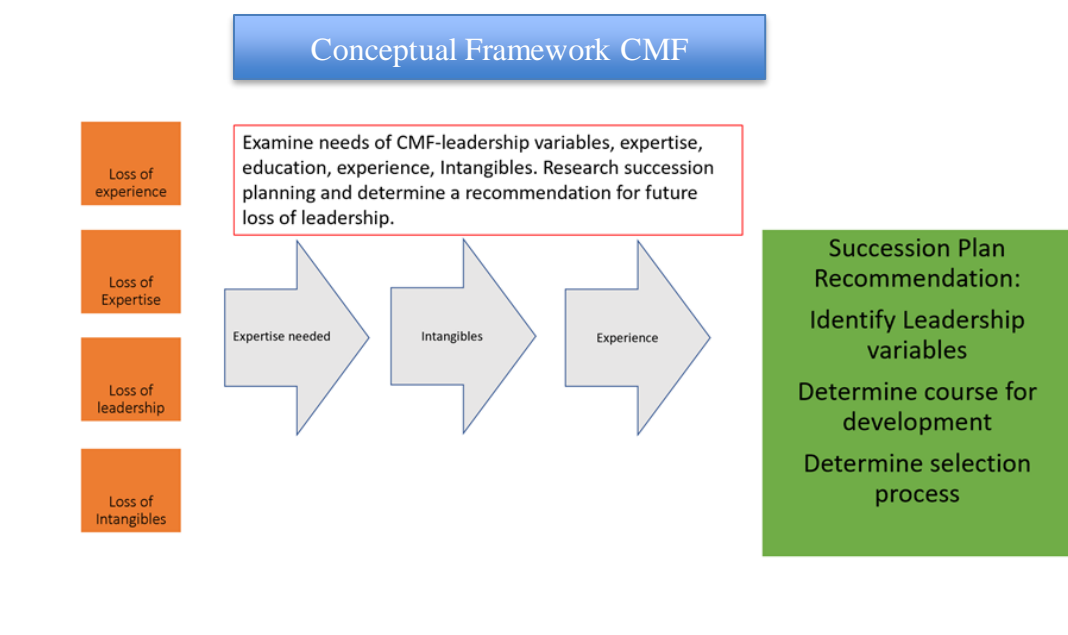
In this study, I compiled essential organizational information from CMF to craft a framework for succession planning for the foundation. The feedback collected from the CMF staff, board of directors, and patrons culminated in a comprehensive summary in which I laid the groundwork for the recommended succession planning framework. The specific goals of the organization and the type of leader needed to reach those goals were addressed and plotted based on information collected through the questionnaire and any follow-up clarification.

Adhering to established practices in qualitative research (Maxwell, 2013; Morgan et al., 2017), in this study I integrated various data collection methodologies, including a self-reported questionnaire, archival data review, and follow-up questionnaire information for clarity regarding the information received from the various CMF stakeholders. In this qualitative case study, crucial insights into CMF's leadership transition planning and the vital organizational factors ascertained through meetings, questionnaires, and follow-up interviews are summarized (see Baxter, & Jack, 2008; Gilgun, 1994). I then structured the accumulated knowledge to create a succession recommendation for future leaders that might be selected to continue the organization's work and mission following a transition.

In this section, I discuss pertinent concepts, models, and theories, exploring their applicability to nonprofit and for-profit organizations. The organizational background and contextual nuances are also described to familiarize readers with the study site organization. Finally, the role of the researcher is explained before a summary concludes thes section.

Literature Search Strategy

To uncover pertinent insights related to succession planning, I leveraged multiple resources, such as Walden University's academic databases and library; Chicago State University library; Cornell University library; and scholarly platforms, like Google Scholar. The keyword search terms used included combinations of the following terms: *organizational development, succession planning, nonprofit succession planning, small nonprofit succession, leadership transition, transition studies,* and *nonprofit transition*.

The scope of the review of literature for the study included research primarily published in the last 6 years (i.e., 2017 to 2023) and was supplemented by seminal articles from a later period that were important for the breadth of the research. The sources reviewed included peer-reviewed articles from professional journals, online resources, books, newspaper articles, and dissertation reviews. My search for relevant published outcomes guided the approach of the study by providing examples of scholarly articles and other published materials focused on the PAS topic. The time frame used for the study period kept the study relevant and current.

Conceptual Framework

Analyzing nonprofit organizations often involves assessing the existing organizational components against for-profit organizations and identifying shared characteristics inherent to nonprofit businesses (Laurett & Ferreira, 2018). The CMF is a small nonprofit organization that has come to a point where new leadership will be needed to move into the future. However, this nonprofit organization maintains a rich history and record of involvement in the community that can inform future decisions regarding leadership selection.

In this study, I examined many succession frameworks to consider the factors informing the proper framework for the CMF. The conceptual framework of a study highlights the study's alignment with pertinent theories, the researcher's perspective, past studies, and critical inquiry on a subject (Tamene, 2016). The conceptual framework for this PAS grew from the understanding of the theory of functionalism with regard to relational institutions and social action (see Toepler & Anheier, 2004). Conveying

expertise through understanding of succession in theory and through the personal

experience of the researcher working in nonprofit organizations that have experienced

leadership change is an additional critical factor . According to Ormerod (2020),

functionalism theory connects the dots between human interaction and societal systems.

The systems can be identified through observing the actions of the organizational actors.

Talcott Parsons, a renowned social scientist credited with pioneering functionalism,

created functionalism theory by examining the existing social theories with an underlying

interest in social action (Lischka-Schmidt, 2023). Notably, Parsons identified relational

institutions as pivotal constructs within the framework, emphasizing the deciphering and

forming of individuals' titles and functions in systems where they exist (Ormerod, 2020).

In the context of the current study, the succession process outlines the relational

institution of an organization. The succession process involves taking a specific

organization going through a change in process or relationships, the identification of

specific actors, and organizational needs to move the organization to action (Farah et al.,

2020).

Throughout personal and professional experiences, I have collaborated with

multiple social justice-based nonprofit organizations both within and beyond the realm of

higher education. Many of these organizations confronted leadership changes that needed

immediate succession planning. Gothard and Austin (2013) shared that the primary

recognized leadership turnover methods are crisis based or planned in structure. My

firsthand experiences underscore the imperative of proactively cultivating leadership

development to buffer against the repercussions of abrupt or gradual leadership

departures. Historically, the accumulation of experiential knowledge has been instrumental in informing and refining leadership decisions (Al-Kurdi et al., 2018; Davenport & Prusak, 1998). The cultivation of collective wisdom, continuously enriched and shared within an organization, emerges as a vital organizational asset. In the next subsection, I explore the connection between academic research, organizational affiliations, and the study structure that was used to solicit the information needed to make a final succession recommendation.

Literature Review for the Study

Early Succession Planning

Organizational theory provides a comprehensive framework for understanding organizational change. Pierce et al. (2002) categorized organizational changes as either preemptive or responsive, and as-expected or unexpected, relative to broader societal shift. While change is an inevitable facet of organizational dynamics, the manner in which an organization handles change presents unique opportunities to be strategic with future opportunities. For example, leadership transitions, a fundamental challenge across organizations, can be tactically managed through succession planning, offering an opportunity to address the leadership transition within the organization purposefully (McKee & Froelich, 2016).

Organizational transition occurs for many different reasons. Developing a succession plan allows an organization to embrace transition in an intentional way beyond simply replacing an employee. Looking at an organizational change event through the organizational theory lens reveals that managing succession can involve

multiple factors, such as the size of the organization, geographical location, and other tangible factors that impact succession (Johnson et al., 2018). These factors can be used to determine the feasibility of a succession plan and the applicability of such a plan in the organization.

Recurring events, such as retirement and leadership transition, are anticipated milestones within an organization's lifetime. Studies have shown that organizations that plan for change are more effective at managing the change when it occurs (Rothwell, 2011). However, while succession planning offers a structured approach to leadership transitions, there are many methods that can be deployed with proper organizational identification. The study of organizational theory concerning leadership change management presents several distinct workforce planning approaches that have been formally studied since the 19th century. Each of these practices or the variety has grown out of the necessity of the individual organization.

According to Narayanan and Nath (1993), organization theory serves as a foundational framework for how things work in organizations or an understanding of their working parts. Organizational development theory highlights the critical components of the culture of organizations that determine success or failure. Leadership and organizational development provide a backdrop for the culture that frames the management of resources for the organization. Cummings et al. (2016) further stated that Lewin's change model offers a pragmatic lens through which organizational transitions can be observed, characterized by a distinct start-stop nature inherent to leadership change processes. Studying an organization's culture offers clues to what the

organization prioritizes through those changing events. Identifying these priorities helps determine the type of succession activities most appropriate for the organization going through a leadership change.

According to Ballaro and Polk (2017), elements, such as leadership, stakeholders, goals, and mission, are critical aspects of an organization that are measured and studied to determine current and future success. A triangulation of these elements provides the trajectory for future leadership within the organization. Organizational leadership must constantly define what is most important to the organization to recognize the type of leader needed to accomplish those defined objectives (Kammerlander et al., 2015). The metrics of success during leadership transitions are multifaceted, encompassing financial benchmarks, the achievement of organizational goals, and/or how well organizations manage change.

Helmig et al. (2004) explained that the efficacy of nonprofit organizations hinges on the adept navigation of political landscapes and interpersonal relationships. Supporting the new leader through their transition and bringing the organization along with a successful transfer of knowledge are critical factors in relation to success (Tunheim & McLean, 2014). The accumulation of knowledge from past leaders and key organizational players encapsulates established practices, along with defining who and/or what has been of importance in the organization. The early stories of leadership transition perpetuated the myths of great leaders and the demise of organizations that made the wrong transition decisions (Kotter, 2007). Earlier forms of leadership transition addressed

the loss of a leader and highlighted the need to be direct and strategic in determining the next leader.

Action Research Theory

This study of the CMF, a nonprofit organization, was conducted in order to determine a path toward recommending a succession process. It requires engagement at all levels of the organization (Davis & Dolson, 2018). Through gathering thoughts and considerations, as well as observing and reflecting on the perspectives of stakeholders, each data point is key to capturing what is important to CMF. According to Davis and Dolson (2018), incoming leaders must negotiate the organizational culture, and those aspects that are critical to CMF should be prioritized to align with future goals. Every member of the organization presents new information and perspective about the type of leader that should be developed and selected. The primary goal is to begin by considering the current state of the organization and projecting what will be needed of the organization in the future, while also considering how this will intersect with the arrival of a new leader.

Leadership loss in an organization reveals a great deal about the identity of the individuals who remain (Walsh & Glynn, 2008). Understanding the value of the departed leader becomes more salient in loss. Gaps in knowledge and processes quickly become evident, prompting the remaining staff and stakeholders to embark on a process reimagining the organization (Ballaro & Polk, 2017). In this case study, feedback from the CMF organization that focuses on their needs today and in the future. This presents an opportunity to assess the previous leader's vision, the organization's mission, and the

practices that defined it over the years (Ballaro & Polk, 2017; Davis & Dolson, 2018). This process serves to reaffirm the organization's commitment and provides context for the future leader with regards to the organization's past. Through this action-oriented activity, there will be opportunities to consider the work that CMF has accomplished and those things that were never completed.

As the study progresses, knowledge is gained through what Kolb (1984, 2014) refers to as experiential learning lens. In higher education, this approach emphasizes learning within the practitioner through experience. The use of organizational analysis tools such as SWOT interviews, surveys, and other inquiry tools creates a space for fostering action research (Greenwood, 2015). By reflecting on the perspectives of staff, patrons, the board of CMF, as well as the data from the analysis tools, possible paths for the future can be collectively identified.

Schon (1983) suggested the process of reflection in research brings clarity to old goals and pursuits. As leadership transitions from one individual to another, an organization undergoes changes, incorporating the perspectives of previous leadership while adopting the goals and direction of new leadership. The theory of action research emerged in the early 1940s as an early indicator of organizational development (Burnes & Bargal, 2017). Kurt Lewin, a scholar in organizational knowledge, is credited with the action research theory, which highlights the need for organizations to be in a state of action to remain relevant (Greenwood, 2015). Lewin conceptualized the process of change through a three-stage model that illustrates how organizations manage an event that impacts the flow of business. According to Lewin, organizational change occurs

through a process of unfreezing, changing, and refreezing (Cummings et al., 2016). Using this framework to conceptualize a change, unfreezing represents a leader's transition and the opportunity to assess what is needed, leading to change. After the change, the organization can stabilize and return to a solid shape, represented by refreezing.

Developing an organization to meet future needs involves considering the process of leadership change (Rothwell, 2011). The period of leadership transition presents a significant challenge for the organization to find stability and move forward. Therefore, succession planning and development become critical areas to focus on in organizational development efforts. Understanding the change process from the perspectives of all parties involved provides insight into the necessary preparations for a strategic plan.

When considering the action research framework, gathering information and fully capturing the perspective of organizational constituents regarding leadership requires reflective practice (Priddis & Rogers, 2018; Schon, 1983). Reflecting on the history of CMF and contemplating the future, Lewin's steps of unfreezing, changing and refreezing are illustrative. It is valuable for organizations to have a space in their development process to take inventory of where the organization stands at that moment, while identifying areas that require redevelopment following a change. According to Stouten et al. (2018), organizational change takes time, which is one of the variables in the organizational development process. Succession planning provides organizations with both time and an intentional process for managing change.

When an organization transitions from one leader to the next, while considering the past, it undertakes a comprehensive succession process (Stewart, 2016 A). Reflecting

on the past allows organizations to build a plan based on their existing foundation. Some of the earliest succession planning considerations can be linked to Henri Fayol. Fayol was among the first scholars to assert the importance of leadership development and training for managers (Edwards, 2018).

Fayol understood the significance of workforce management planning and preparing for leadership development and training for managers (Edwards, 2018). Fayol believed in the importance of planning workforce management and preparing for the leadership departure with the next group of staff members ready to go (Edwards, 2018; Fayol, 1916). Preparing leaders in advance, as a precautionary measure for inevitable leadership changes, ensured the organization's continuity of established practices and norms. In theory, these practices align with modern succession planning, although they are more comparable to turnover readiness.

The field of workforce planning or succession planning delved deeper into the study of leadership in the 1950s and 1960s, as researchers began to study the transitions of leaders in and out of business (Kesner & Sebora, 1994). The transition of leadership in organizations was not a new phenomenon, but there was a growing interest in understanding the most effective approaches through documented research. From the classical days of organizational development to the early days of succession planning and development, there are several perspectives to consider when strategizing leadership transition in an organization.

Scholars initially explored succession-reported cases of organizational transition. According to Kesner and Sebora (1994), these case studies highlighted much of the

knowledge of succession at the time. The collective understanding of succession was derived from the tacit knowledge gained from organizations that had undergone workforce transition. The reported experiences served as models for organizations facing similar challenges.

Kesner and Sebora (1994) stated there are multiple distinct periods in the development of succession planning that highlight the progressive nature of planning over time. The earliest period marked the introduction of succession planning as a practice. Where practitioners began to formulate strategies and tactics that would be deployed. The second period marked the transition from succession planning practice to theory. The decided practice evolves into theoretical approaches to the planning process. The third period represents the formal progression into a field of study that continues today.

Grusky (1960) and Carlson (1961) laid the foundation for the study of succession planning through observations in sports and early organizations. They framed the nature of succession by identifying critical variables observed in the case studies of the teams they examined (Kesner & Sebora, 1994). They considered factors such as timing, the organization response during the transition, and that the decision to transition leadership in an organization is an expected outcome for organizations over time.

Succession is of vital importance as it directly affects the continuity of an organization (Grusky, 1961). The decisions made following a leadership transition can either propel an organization in a productive or stagnant position. Early studies on succession examined how it impacted organization performance (Grusky, 1961),

recognizing that organizational performance is critical for success. As time passed, the ambiguous nature of leadership changes in organizations became prime variables to consider and study to improve organizational performance. In the case of CMF, there had been minimal leadership changes, resulting in a lack of established practices and considerations. Transitioning from one leader to another involved individuals with expressed interest grabbing the opportunity when presented. With such consistent leadership over a prolonged period, a strategic approach had become less likely.

Early succession theories emerged from these initial studies, serving as a foundation for future studies that would examine the rationale for succession planning. Scholars identified three early theories in the study of succession: the vicious cycle theory, the commonsense theory, and scapegoating (Gamson & Scotch, 1964; Grusky, 1960, 1963). As organizations increasingly recognized the strategic importance of succession, the methodical, measured approaches employed provided examples of practice. From the examples of practice in place grew this new opportunity to classify succession approaches. There was an opportunity to define succession beyond anecdotal analysis.

The Vicious Cycle Theory

The vicious cycle theory describes the recurring issues that arise when leadership changes occur. It refers to the challenges organizations face during succession as they wrestle with the newness of the transition or changes in the business (Grusky, 1960). Each leader brings a specific purpose or approach to leading the organization, and the

organization must adapt to the leadership profile each time a change occurs. The cycle of leadership changes leaves an impact on the organization.

The Commonsense Theory

The commonsense theory suggests the track record of leadership reflects the effectiveness of a leader in previous leadership opportunities. Researchers agree that a change in leadership in poorly led organizations can lead to better performance (Kesner & Sebora, 1994). The record of leadership often determines how effective leaders have been over time. The commonsense theory emphasizes the transition of leadership to enhance organizational performance (Grusky, 1963). This is often observed in sporting teams and organizations looking to maximize talent and utilize human resources effectively. The change in leadership prompts reflection on organizational effectiveness and forecasting for future success. While the leader's performance can indicate future success, there are other factors that impact organizational success.

Scapegoating Theory

The scapegoating theory recognizes that organizations have multiple layers of leadership and decision-makers who shape the course of business and opportunities. Leadership changes and succession transitions are viewed critically within the organization. In cases of leadership failure or perceived failure, scapegoating becomes a way to assign blame or attribute failure to past leaders (Gamson & Scotch, 1964).

Over time, these theories have been reviewed and applied to describe succession transitions in professional sports and extended to the business context. The generally accepted belief is succession planning can be a positive initiative that promotes greater

organizational connection for employees (Okwakpam, 2019). While the early theories and ideas primarily focused on the process, more contemporary considerations of succession planning moved to consider data and identity (Epitropaki et al., 2017; Lord et al., 2017).

Modern Succession Concepts and Theories

As organizational development theories have evolved, so has the concept of succession. Today, succession planning involves deliberate steps toward planning for future talent management changes within the organization (Chiocchio & Gharibpour, 2017; Sparrow & Makram, 2015). Succession moves from one leader to the next, with each leader's experience shaping the path (A. J. Stewart, 2016). A change in leadership signals a shift in organizational strategy, and these strategic changes have lasting implications for the organization's performance over time. According to Friedman and Singh (1989), the change that occurs following succession can bring about measurable positive adjustments. These changes happen during a specific period in the organization's timeline and impacts all the components of the organization. The succession change emerges as a salient event in organizational culture. Li (2019) highlighted the connection between the organizational life cycle theory and growth. The leaders selected to inherit the past and the opportunity to mark growth. Understanding this cycle. And its impact on succession. is crucial for the success of the new leader and the members of the organization.

The development of a succession plan has become an essential tool in organizational management (Rothwell, 2011; Stewart, 2016 B). Organizations that invest

internally and take inventory of what is needed have been most successful. The resource

dependency theory highlights the interrelated nature of organizations and the importance

of their relationship with the external environment (Biermann & Koops, 2017).) The

literature highlights the role of organizational boards in determining the external needs of

an organization for new leaders (Brown, 2005; Hillman & Dalziel, 2003). By identifying

and understanding the organization's external needs and the consequences of meeting or

failing to meet those needs, organizations can create an intentional succession plan.

Intentional succession planning involves considering both internal and external

candidates for leadership, considering the organization's needs and the organizational

timeline (Cappelli, 2011; Friedman, 1986). This strategic approach, which focuses on

internal leadership development and succession opportunities, reduces the opportunity for

scapegoating and the perpetuation of the vicious cycle. Succession planning entails

designing an intentional and organized approach to preparing future leaders (Ballaro &

Polk, 2017).

A historical analysis of for-profit management practices reveals that the

advancement of succession planning. as a tool for managing such organizations, has

sparked numerous scholarly studies on the process (Beatty & Zajac, 1987; Kesner &

Dalton, 1994; Kesner & Sebora, 1994; McKee & Froelich, 2016). Overtime, succession

planning best practices have emerged, continually refining the key variables involved in

determining successors for each organization. While the specific needs of each

organization may differ, an intentional effort provides the best likelihood of a successful

succession outcome.

Throughout the literature, certain recurring variables are highlighted, including the identification of potential successors, the development of a process for identifying potential successors, and the ultimate determination or selection of a successor (Perrenoud, 2020). Other variables consistently listed as essential in most succession plans include conducting an inventory of the organization's strengths and weaknesses and creating shared leadership opportunities before the departure of the incumbent leader (Gothard & Austin, 2013; Schepker et al., 2017).

While many early studies on succession planning focused on for-profit organizations, in reviewing the literature, there are transferable management practices that extend to nonprofit organizations. However, there is a lack of development of nonprofit organizations' succession plans (Gothard & Austin, 2013; McKee & Froelich, 2016). The complex organizational structure of nonprofits often leads to a lack of succession planning in nonprofits. Santora et al. (2015) highlighted how critical succession planning is for the future and growth of nonprofit organizations globally (p.14). Organizations risk ineffectiveness in transition times without an intentional focus on leader development and preparation for succession.

Nonprofit Succession

There is a wealth of scholarly studies on succession planning and leadership transition in for-profit organizations (Beatty & Zajac, 1987; Kesner & Dalton, 1994; Kesner & Sebora, 1994). The challenges faced by nonprofit organizations during succession planning are similar to those experienced by for-profit organizations. However, there is a significant opportunity for future growth in the knowledge and

understanding of succession planning specifically tailored to the nonprofit organizations (Gothard & Austin, 2013; McKee & Froelich, 2016). Recent shifts in the nonprofit workforce have identified a gap in the leadership development process that impacts succession planning.

According to Bozer and Kuna (2013), nonprofit organizations often lack formalized succession planning processes and plans to support organizational transition. This absence of a formal process presents a negative obstacle to the development of leaders within nonprofit organizations. Succession in nonprofit organizations reveals the complexity of leadership roles, beyond for-profit organizational leaders (Bush, 1992; McFarlan, 1999; A. J. Stewart, 2016). In nonprofit organizations, leadership, the staff, the executive boards, and volunteers play an essential role in sharing and continuing organizational culture development. Researchers assert that the work of the executive in nonprofit organizations is complex, and this complexity affects the prioritization of initiatives for leaders (McKee & Froelich, 2016).

With the increasing complexity of nonprofit organizations, the value of the executive board's influence and perspective emerges as a critical reason for the need to define nonprofit organizational succession planning. McKee and Froelich (2016) provided a critique of nonprofit succession planning and highlights the lack of planning is one of the challenges in the field (p. 588). Proper planning allows organizations to account for the board's role in moments of transition. The challenges associated with nonprofit organizations effectively planning for succession are inevitable. There are no

surprises; succession is simply the business practice that is most adopted currently. Organizations have found multiple ways to survive leadership changes.

Many nonprofit organizations have successfully managed leadership transitions with the assistance of executive boards and active volunteers. The resource dependency theory emphasizes the importance of organizational boards in the succession process (Brown, 2005; Hillman & Dalziel, 2003). Nonprofit boards contribute to succession, acting as volunteers in the process and engaging in the organization's work, while considering the factors outside of the organization during the transition. The board of directors' insight and history are invaluable to the organization's succession process (Li, 2019).

The CMF experienced a loss of knowledge accumulated over the years during the departure of their longstanding leader upon her retirement. Much of the organization's knowledge was held in the leader's mind and manifested through familiar actions of the leader. Although her impending retirement was known, there was no formal plan in place for the transition. Stone (1991) described the typical board of directors' reactionary approach to planning and highlights the challenges that come with the reactionary approach. Stone aptly characterized nonprofits as unprepared and succinctly outlines many of the long- and short-term challenges of the CMF. As a result of the leadership change, the CMF board and continuing staff were thrust into an organizational change with little time to plan or develop an appropriate solution. The CMF staff are interested in approaching the transition strategically, creating a succession plan that entails selecting a leader and developing future leaders.

The CMF has enjoyed stability as an organization for the past 20 years due to consistent leadership. It has been providing regular programming that meet the community's needs and operates a small vegan restaurant. The collective services and business of the CMF have been the result of invested energy and leadership throughout the years. As a result of such strong leadership and investment by the leader, the CMF lacks a concrete succession plan. in part because there was no need. With such stable leadership over time, the CMF neglected to plan accordingly for the leader's eventual departure. To move forward, the CMF will take inventory of what is most important as an organization.

By reviewing the for-profit and nonprofit succession planning literature and considering the history of the CMF, it becomes evident that developing a succession plan will involve multiple factors. The most prominent among those factors will be the leadership qualities of the future director. This raises the question: What perceptions and suggestions do the CMF staff and board of directors have regarding the desired qualities in a new leader and the process for leader selection?

While organizations routinely consider future staffing and development, nonprofit organizations rarely have sufficient time to meaningfully plan for succession (Gothard & Austin, 2013; McKee & Froelich, 2016; Mooney et al., 2013; Yawson, 2019.). An organizational succession plan will provide CMF with a tool to make intentional decisions about executive leadership and the future direction of the organizational development. Since much of the CMF's information and processes are in the mind and memories of the longstanding leader it will be essential to capture the business practices

needed to manage the foundation going forward into a well-thought-out succession plan after recommendations based on work needs, staff perspectives, and key stakeholders' interests.

Summary

This PAS concludes with a proposed recommendation for a succession plan that considers the critical needs of the CMF staff, board of directors, and patrons. The issues of succession planning are essential because the CMF plays a vital role in community organizing and development, driving social changes in Champaign-Urbana, Illinois. The CMF is a community space that fosters social change and critical conversations that advance the collective Champaign/Urbana community.

The next section of the study involves gathering data related to the organization. The CMF staff and executive board had the opportunity to share thoughts on the future leaders of the organization, which serves as valuable feedback in shaping the recommendations. Additionally, an examination of the organizational culture of the CMF was conducted to provide recommendations for a succession plan specific to the CMF, with possible applications for similar multifaceted nonprofit foundations.

Section 3: Data Collection Process and Analysis

Introduction

All business organizations face many challenges concerning organizational leadership turnover and the development of future leaders. Nonprofit organizations are no different from for-profit organizations in this regard. The problem facing the CMF is the lack of a leadership transition plan to address the void created by the recent retirement of its established leadership. All business leaders will inevitably reach the end of their leadership journey, but the departure is particularly challenging at the executive level.

During transition periods, organizations face competing priorities, such as leadership development and asset management, which can pose challenges to organizational development (Santora et al., 2015). I conducted this study to provide a recommendation for a succession plan for the CMF. This study highlights the organization's needs as expressed through collected feedback from stakeholders and a review of the literature on succession planning to provide a strategy to the CMF for future leadership transition events.

The CMF is a small nonprofit organization that underwent a leadership change in the last few years. The organization is located in a large physical space where they coordinate and support multiple active causes, both in the local community and abroad, with a focus on justice-based issues. Part of their challenge was the need for more staff, the development of succession planning, and the development of a plan based on organizational priorities. This leadership transition presents an opportunity for CMF to consider a strategic approach to address this critical event and future transition events.

In this section, I provide the practice-focused questions as well as describe the role of the researcher, methodology, recruitment strategy, and data analysis process. The section includes a discussion of the issues of trustworthiness and ethical procedures. Finally, the section concludes with a summary.

Practice-Focused Research Questions and Research Design

The CMF is currently experiencing an organizational transition that is common among organizations throughout their life cycle (see Al Suwaidi et al., 2020; Grusky, 1960). The change in leadership presents a significant challenge for the CMF because it lacks a plan to navigate this disruptive transition period. The departure of leaders due to retirement, changing interests, or job effectiveness is a common occurrence in organizations of all types; however, what is less common is a consistent approach to addressing these organizational changes in leadership. The nonexistent plan requires CMF to think strategically about organizational advancement.

Various organizational units, such as the board of directors, staff, and constituents/patrons, play a crucial role in the transition of leadership and the steps taken between the departure of the previous leader and the selection of a new one. These units' thoughts and engagement regarding the future of the organization provide perspective on how the organization moves forward.

The practice focused research questions developed to explore the needs of the CMF allowed for input from various stakeholders involved in the study. The perspectives of the staff, the board, and patrons provided a framework for determining the type of information that needed to be collected and organized for future transition. The practice

focused research questions were transformed into a questionnaire that was distributed to voluntary participants who chose to take part in the CMF study. The narrative-based design of the study facilitated a shared understanding of both the internal and external data or input and the goals of the CMF (see Li, 2019; Richards, 2020). In cases where questionnaire data responses were unclear, I asked follow-up clarifying questions for further clarification.

<div align="center">**Roles of the Researcher and Client Organization**</div>

The objective of this PAS was to gather the necessary information to provide a more accurate succession planning recommendation for the CMF. Throughout the study, I took steps to ensure transparency and maintain an ethical approach (see Levitt et al., 2017). With one sole researcher, working in collaboration and cooperation with the CMF, it was crucial to engage with CMF stakeholders to understand the organization's culture and history.

The motivation behind this study stemmed from a strong desire to support a significant small nonprofit community organization. This opportunity allowed me to complete a PAS and contribute as a doctoral scholar. Pursuing a terminal degree provided me with an avenue to expand knowledge and research on a topic that is crucial to organizational development and aligned with my professional interests. I am familiar with the CMF staff and constituents and have a connection to the community as well.

I maintained contact with the CMF staff throughout the study to foster a strong relationship with the organization. The CMF staff, board of directors, and patrons were invited to share their perspectives on leadership and the process of selecting a new leader

for the CMF. To minimize potential biases, I made conscious efforts to conduct thorough information reviews during the data collection and review processes. Taking the time to carefully consider the participants' responses and consider the archival data in the context of the organizational culture is important for verifying information within the parameters of the study and allowing for opportunities to rethink and consider the data collection process (Mackieson et al., 2019). To prevent any personal bias in data interpretation, I asked participants to not provide their names. Instead, participant identities were hidden through randomly assigned pseudonym identifiers following data collection.

Methodology

The case study methodology selected was to review the CMF organization, considering the individuals involved, the organization's history, and other relevant archival data. I derived the qualitative data in this study from people, archives, and other pertinent sources of information that contributed to a comprehensive understanding (see Harrison et al., 2017). To access the various forms of archival data, the CMF staff assisted with identifying resources and provided guidance on locations where helpful information could be found. The archival data existed in multiple formats, ranging from online social media sites that have captured the history and movement of the CMF to print material converted to PDFs. The first source of archival data was the CMF website, which listed the current leadership, new staff members, and the new board. The CMF Facebook page also served as an additional source of archival information, providing insights into past events, speakers, and engaging content that are significant aspects of the CMF's history and its impact on the community. Obtaining this information was crucial

for developing a comprehensive understanding of the organization's culture and its significance to the community.

There is limited extant research on succession planning in the nonprofit sector, particularly for smaller organizations with minimal staff. There is also a lack of scholarly literature specifically focusing on the leadership transition process in small nonprofit organizations like the CMF. Therefore, I conducted this study to close the existing knowledge gap in succession planning for small nonprofit organizations.

Strategy for Data Analysis

Questionnaire Questions

In this study, I employed a questionnaire that was developed based on initial meetings with CMF staff regarding leadership transition. The formulation of the questions was also influenced by previous studies exploring succession in nonprofit organizations (i.e., Froelich et. al, 2011).

The questionnaire data were collected as individual participants completed the instrument. As participants entered responses the data populated into the google spreadsheet connected to the form, a review of the data followed to ensure response clarity. I addressed any instances of unclear responses through sending follow-up emails to the participants. The responses were then transferred to a precoded spreadsheet. I used a keyword-based grounded theory approach to analyze the data, identifying themes and patterns that emerged from the responses.

The case study research design supported me in fulfilling the purpose of the study. The case study design involves reviewing and gathering data from multiple sources

(Hyett et al., 2019). This study consisted of several components: All participants received and completed the questionnaire, then I screened and reviewed the information collected from the questionnaires and analyzed and reflected on what information surfaced about the leadership selection opinions of CMF from the questionnaires. The goal was to obtain 12–15 participant responses to achieve a nominal level of theoretical saturation (see Yin, 2012).

Data Analysis

Before collecting data, I received approval to conduct the study from the Walden University Institutional Review Board (IRB; Approval # 08-25-24-0806036). I contacted the CMF staff and shared the approved informed consent form, flyers, and questionnaire. The questionnaire was then distributed to the general CMF community, including the staff, board, and patrons. I analyzed their responses to the questionnaire to identify themes and determine an appropriate succession planning model for the organization.

In the initial phase of the analysis, I gathered and reviewed the collected questionnaire responses. Questionnaire responses were evaluated using various categorical frameworks, focusing on keywords, thoughts, and the order of importance to each participant (see Bernard, 2017). Words or phrases that surfaced in relation to the probing question were also noted. The coding process began with a manual count and color coding of words and phrases that were initially identified as relevant to the questionnaire's probing questions. After the manual color-coding process, I combined the words and summarized them into thematic categories. These themes represent the collective perspective of CMF patrons, staff, and board members regarding each probing

question. The responses to the research questions, along with the data from the questionnaires and organized discussions, formed the framework of the succession planning recommendation.

Collecting information through questionnaire distribution, follow-up questions, and archival data provides valuable information to be interpreted. As suggested by Yakut Cayir and Saritas (2017), I utilized analytics tools and software to help analyze the data. The questionnaires were reviewed, and specific words and themes emerged, shaping the narrative that informed the final study. The data analysis concluded with a findings report connected to the succession recommendation.

Issues of Trustworthiness

The questionnaire responses and archival data can be considered trustworthy due to the validity of the data being based on the recommendations and accounts of individuals within the organization. These data sources provided personal insights into the events and developments that have shaped the organization over the years. For instance, the archival data provided by Anderson (1979) included historical accounts of the organization's formation in the history of the foundation, captured in an organized and dated fashion.

The study participants included staff, patrons, and board members of the CMF, which allowed for variations in participant data and increased the potential transferability of the findings. However, it is important to note that this was a single case study of a small nonprofit organization with a relatively small sample size of 11 participants, which limits the generalizability of the results.

Credibility

To ensure the credibility of the study, I used a questionnaire that allowed each participant the opportunity to self-report their perspective after identifying their status connection to CMF. Delve and Limpaechar (2021) emphasized coding data in relation to qualitative research to move toward themes that emerge from the participants' responses. This involves categorizing and labeling the responses to uncover connections and themes. Reflexivity involves a critical examination of judgments, actions, and belief systems of the researcher during the data collection process, so it does not impact the research (Delve & Limpaechar, 2021). This approach ensures that the results accurately reflect the participants' perspectives only. I employed reflexivity as a strategy to enhance the credibility of my findings (see Creswell, 2018; Darawsheh, 2014). Taking opportunities throughout the study to reflect on the findings and each step of the process became key to maintaining consistency. In addition, throughout my study, I was committed to maintaining trustworthiness through transferability, dependability, conformability, and clarity in my methods and reporting.

Transferability

This single case study of a small nonprofit organization, with a relatively small sample size of 11 participants, provided a model for how to approach an organization in the consultative service context and provide recommendations for similar organizations. Nowell et al. (2017) linked transferability to the ability to extend the applicability of research findings across diverse contexts and with different participant groups. Enhancing transferability across diverse settings involves providing comprehensive

descriptions in the reporting of data, enabling researchers to determine the research's

relevance in different scenarios (Kim et al., 2017; Nowell et al., 2017). This study

incorporated self-reported questionnaires where participants provided answers based on

their perspectives and experiences. The specific categories of the participants, the

research methodology employed in this study in the nonprofit environment, and the data

collection approach are all important factors in determining if the approach used for this

study would be transferable. The insights gained from this study are anticipated to be

relevant and transferable to other small nonprofit organizations going through leadership

changes.

Dependability

This study's methodology is designed to be replicable in similar contexts and is

adaptable to varying conditions in different studies. To achieve dependability, clear and

concise documentation of the study process has been shared (Nowell et al., 2017). The

detailed portrayal of participants' perceptions of their experiences aims to bolster the

reliability of this research. Such detailed accounts will serve as a reference point for

analyzing their experiences,which will contribute to the recommendation crafted (Kim et

al., 2017). Nowell et al. (2017) shared that maintaining a map of the study process will

further ensure dependability and confirmability of the research findings.

Confirmability

To ensure dependability and confirmability, the research questionnaire underwent

multiple revisions based on feedback and reviews of the study. Confirmability refers to

the degree to which the outcomes of a research study can be corroborated by others, as

described (Nowell et al., 2017). Each review opportunity provided an additional perspective to ensure that the questionnaire accurately reflected the data needed to answer the research questions. In qualitative research, confirmability plays a key role in reducing bias, achieved through techniques and methods, such as data triangulation and reflexivity (Ndanu & Syombua, 2015). Confirmability is essential for establishing the trustworthiness and accuracy of the research. In the end, the value lies in the assessed quality of qualitative studies in relation to how meaning is made of the data (Chowdhury, 2015; Nowell et al., 2017).

Ethical Procedures

An overall ethical approach during to the study was critical therefore transparency was prioritized (Levitt et al., 2017). I, as the sole conductor of the study, worked in collaboration and cooperation with the CMF. Understanding the culture and history of CMF was a critical part of my role, and I actively engaged with stakeholders. Participant recruitment was conducted using non-coercive processes, with virtual flyers and emailed invitations being sent out. Perceptions of coercion were minimized through transparent study details. Personal information of online volunteer participants was confidential, and their names were changed to enhance privacy. Except for email addresses, no names or contact information were collected. Email addresses were solely used for potential follow-up meetings to clarify questionnaire responses. Participant demographics were not shared in a manner that could identify individuals, and the identity of the partner organization was masked. Participants could discontinue their participation at any point during the questionnaire or follow-up discussion process. All electronic questionnaires

were securely stored in a password-protected Google Drive. Questionnaires, data-gathering tools, and notes were stored in a desk behind multiple locked doors. The data will be disposed of after 5 years, with deletion from the designated drive location.

Summary

A summary report of the study findings will be presented to CMF. The report will include a debriefing on the data collection methods, analysis techniques, and evaluation methods used for the collected data. In Section 4, I will provide a summary of the collected data by highlighting the emerging themes and regularly occurring statements found in the questionnaire responses. This section served as an opportunity to assess the needs that will influence the succession recommendation to be presented to the CMF.

Section 4: Results and Recommendations

Introduction

The purpose of this study was to investigate succession planning within the CMF organization and gather stakeholder feedback to inform a succession recommendation for future leadership transitions. CMF recently experienced the retirement of a long-standing leader who had been a consistent presence in the organization for over 30 years. The event prompted CMF to consider the selection of the next leader and how the organization would navigate future leadership transitions. While there is a wealth of literature on succession planning in for-profit companies, there is limited research on succession in small nonprofit organizations.

In this study, I gathered information from CMF-affiliated individuals, including their self-reported understanding of succession. The information collected was used to answer the research question of the study: What are the perceptions and suggestions of the CMF staff, patrons, and board of directors concerning the qualities desired in a new leader and the process for leader selection? To understand the perceptions of staff, board members, and patrons, I created and shared 12-question questionnaires to solicit feedback. After obtaining their informed consent, the participants' began completing the questionnaires by answering three demographic questions. Following the demographic questions were five probing questions that were designed to gather insights into the understanding of CMF affiliates. Subsequently, an inventory of top leadership qualities was included. Lastly, there were two questions that addressed the respondents'

understanding of CMF's long-term goals and plans as well as their historical interactions with past leaders of the CMF leadership team.

In Section 4, I discuss the data collection and data analysis processes, findings, deliverables, and strengths and limitations of the study.

Data Collection

Eleven participants completed questionnaires that were recorded using Google Forms. Data collection occurred in early October of 2023 until at least 11 participant responses were received. I employed qualitative coding with an inductive approach. The collected data were carefully reviewed, and important points were highlighted. Subsequently, I coded the data to identify themes and patterns that emerged from the questionnaire responses.

Data Analysis

Following Walden University IRB approval to conduct the study, I reached out to the CMF staff and shared the approved informed consent form, flyers, and questionnaire. The CMF staff shared the questionnaire with the general CMF community, including the staff, board, and patrons. I utilized the responses collected from the questionnaire to identify themes and determine the appropriate succession planning model to recommend for the organization.

The first step of data analysis process involved gathering all the participants' questionnaire responses and carefully reviewing them to identify relevant words or phrases related to the probing question. A manual count and color-coding method were employed to mark words and phrases that were deemed relevant to each probing

question. After manual color-coding, the identified words were combined and summarized into thematic categories. These emerging themes represented the collective perspective of CMF patrons, staff, and board members regarding each probing question.

I then reviewed the research question responses, data from the questionnaires, and archival information to form the basis of the succession planning recommendation. The data were analyzed to identify themes and common thoughts and perceptions regarding leadership and transition. I evaluated all questionnaire responses using various categorical frameworks to identify keywords and thoughts expressed by each participant (see Bernard, 2017).

The collective information gathered for this study (i.e., through questionnaire distribution, asking follow-up questions as needed, and the review of archival data) provided valuable insights that required interpretation. Following the suggestions of Yakut Cayir and Saritas (2017), I used analytics tools and software to help parse the data. The questionnaires were reviewed, and I focused on specific words and themes that guided the narrative and shaped the final study. The data analysis concluded with the development of a findings report connected to the succession recommendation.

Findings

In the following subsections, I present the themes that emerged from data analysis. The use of an inductive approach allowed for the identification of themes based on coded similarities and variations in the questionnaire data (see Fereday & Muir-Cochrane, 2006). I used visualization tools to represent the findings. Mathews et al. (2015) suggested that the use of word clouds aid in sharing data. For the probing

questions, I employed word clouds, bar graphs, and charts to share the summation of data.

Probing Question #1

The first probing question was: "How would you describe the culture of CMF?" Six participants described CMF as inclusive and diverse. The words and phrases that emerged as central from the participant responses were inclusive, collaborative, multicultural, diverse, social justice, community, welcoming, and positive. The word cloud in Figure 2 visually represents the key themes and terms mentioned in the participant responses, with more frequently occurring words appearing larger.

Figure 2

Probing Question #1 Thematic Word Cloud

The themes that emerged regarding CMF culture were that it is a community-focused, multicultural organization; has a justice-oriented culture; and a collaborative culture.

Probing Question #2

The second probing question was: "How would succession planning improve the transition of leadership in the CMF?" Six individuals emphasized the importance of moving forward and having a plan to develop talent, action-oriented planning, and clear direction. The emerging themes were focused on the need for succession, organizational stability, and enhancing internal communication. The word cloud in Figure 3 visually represents the key themes and terms mentioned in the participant responses, with more frequently occurring words appearing larger, and gives an overview of the main focus areas and concepts in the context of succession planning and organizational leadership.

Figure 3

Probing Question #2 Thematic Word Cloud

Probing Question #3

Probing Question 3 was: "What principles of succession planning and organizational management are most significant to the leadership transition of CMF?" Seven participants provided responses focused on the theme of organizational development, with an emphasis on culture and values. Additionally, 4 out of the 7 individuals who responded to organizational development shared a focus on planning and goals for the future. The word cloud in Figure 4 visually represents the key themes and terms mentioned in the responses, with more frequently occurring words appearing larger, and gives an overview of the main focus areas and concepts in the context of succession planning and organizational leadership.

Figure 4

Probing Question #3 Thematic Word Cloud

Probing Question #4

In the fourth probing question, participants were asked, "What specific variables would be most important in developing a succession plan during the transition of leadership in CMF?" Six individuals shared responses that were future oriented, planning focused, and goal oriented, which contributed to the larger theme of organizational planning and strategy. Four individuals emphasized the importance of participatory leadership and stakeholder buy-in, highlighting the theme of communication and coordination. The word cloud in Figure 5 visually represents the key themes and terms mentioned in the responses, with more frequently occurring words appearing larger, and gives an overview of the main focus areas and concepts in the context of succession planning and organizational leadership.

Figure 5

*Probing Question #4 Thematic Word Cloud*

Probing Question #5

In Probing Question 5, participants were asked, "What are your thoughts on the key objectives in regards to creating a process of succession in CMF?" More than seven participants shared that the key objective of a succession plan would be organizational structure, including planning, continuity, and clarity in staffing. Another five respondents consistently highlighted the response variable of the preservation of CMF culture and integrity. Five respondents listed this as their primary or additional feedback regarding Probing Question 5. Figure 6 displays participant responses concerning the key objectives in succession planning.

Figure 6

Analysis of Key Objectives in Succession Planning

Thematic Analysis of Organizational Responses
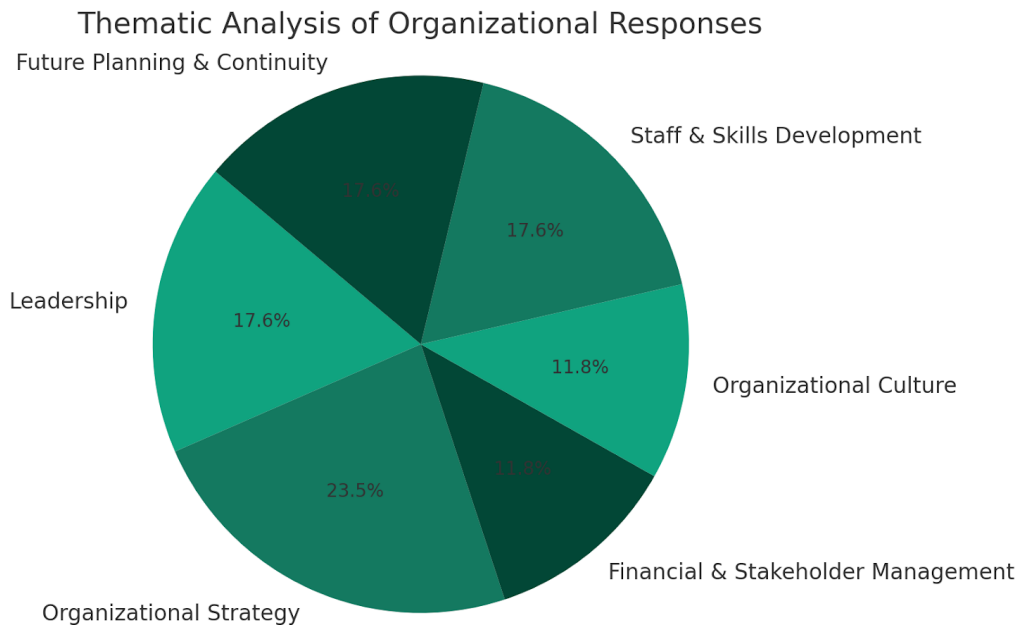
Top 5 Strengths Responses

While analyzing the participants' responses when asked to select the top five strengths that they desired in the current or future CMF leader, it became evident that there are certain traits that are consistently valued in the current and future CMF leadership role. The top five strengths were financially savvy, honesty, integrity, flexibility, and adaptability. Seven participants selected financially savvy as the overall top strength. A financially savvy leader would have the competence to effectively manage resources and contribute to CMF. Honesty and integrity were the next two highest rated traits and also appeared in several responses to the initial probing questions. These qualities are crucial for any leader to build an organization, and they embody much of what has been said about the longstanding leader who was regarded as trustworthy, reliable, and true to their word. Flexibility and adaptability were also highly valued, emphasizing the importance of a leader's ability to adjust to changing circumstances and navigate through uncertainty. This is particularly crucial in the dynamic field of nonprofit and for-profit management, where situations can change rapidly, necessitating leaders who can adapt accordingly.

Figure 7 visualizes the times the various attributes were listed in the participant responses. Each bar represents a unique attribute, and the height of each bar indicates how often that attribute was mentioned across all participant responses. This chart provides a clear view of which attributes were most commonly cited, helping to understand the priorities or valued traits according to the participant responses.

Figure 7

Leader Qualities and Strengths Frequently Reported

Frequency of Attributes in Responses
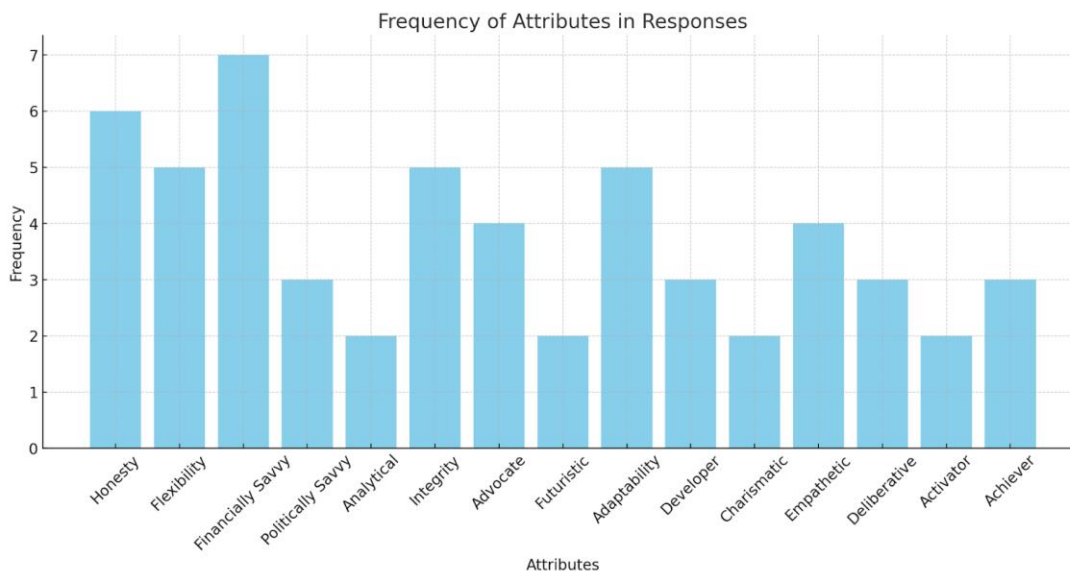
Summary Question #6

I developed the summary question with the aim of capturing any additional thoughts from participants: "Is there anything else you would like to share with me about the CMF?" Seven of the 11 participants indicated that they did not have anything additional to share. Two participants provided narratives regarding improvements made over the last few years. One participant, in particular, used the term, "tenderhearted leadership," to denote an empathetic approach to leadership and managing people. It is synonymous with organizations that have faith-based foundations.

The last two prompts were used to assess the participants' current understanding of CMF goals and plans, as well as their perceptions of past leadership. The first prompt used was, "How well do you believe you know the CMF long term goals and plans?" A little less than half of the participants (i.e., five) indicated that they were "not at all"

familiar with the goals of CMF, while two individuals claimed to be "very familiar" and four individuals stated they were "somewhat familiar." The second prompt was "Please describe your experience and interaction with the past CMF leaders." Two individuals responded positively regarding their interactions with past CMF leaders, while eight individuals mentioned having limited interactions with past staff, primarily interacting with the current staff.

Themes and Response Highlights and Connections to the Literature

Based on the feedback received from participants, it is evident that CMF is an organization that emphasizes focused leadership development and understanding of the organizational resources that are available. Participants consistently highlighted communication and clarity as important themes in their responses. During the analysis of the questionnaire, five overall themes were identified.

The first theme was the need for operational and leadership efficiency, while the fifth theme emphasized organizational resources and stressed the importance of a clear approach to CMF's future and measuring effectiveness. These themes align with literature regarding nonprofit organization development through transitions to maturity (Miller-Millesen, 2003). With leadership turnover, the clarity brought by the previous leader was lost, and participants expressed challenges with stakeholder buy-in and a complete understanding of CMF's identity. In this study, identity was tied to how the CMF functions as a community resource and utilizes its organizational resources, which participants found important.

The second theme focused on the CMF organization's need to remain relevant while maintaining its organizational identity and history, while the third theme focused on structural stability in the environment. These themes intersected and emerged through participant feedback across all probing questions but most heavily in #2, #4, and #5. As a strategic starting point for nonprofits, determining relevance, structure and stability while balancing history is a crucial aspect of overall organizational management (Tenney & Sheikh, 2019). The loss of leadership, the subsequent transition period, and the impact of the COVID-19 pandemic have challenged small nonprofit organizations like CMF to reconsider how they function and sustain themselves during leadership changes.

The fourth theme heavily focused on the culture of CMF, which is of great importance to this small nonprofit organization. The previous leader was dedicated and hardworking and these traits hold significant value for the organization and the future leaders. Despite the various functional directions within the organizational mission, the underlying consistency lies in the culture of openness and upholding of shared values that support diversity and a justice focused nature of the organization.

Deliverables and Recommendations

Consider the overall research question of the study: What are the perceptions and suggestions of the CMF staff and board of directors concerning the qualities desired in a new leader and the process for leader selection?. The results suggest that the CMF is at a pivotal period in the organization's existence. A recommendation for succession provides an opportunity for CMF to intentionally consider what is most important to the organization.

There is a need to focus on internal leadership development, transparency, adherence to values, strategic planning, and a comprehensive understanding of its resources and motivations. According to BoardSource (2021), nonprofit organizations rarely have succession plans in place. A succession model becomes a critical tool that serves as a starting point for formulating strategies that would position CMF in managing through the emerging trend of the departure of longstanding leaders (see Ali & Mehreen, 2019; Milway et al., 2015; Schepker et al., 2017; Tebbe et al., 2017). Embracing change and openly communicating actions to stabilize the organization during change is essential.

The cornerstone of the recommendation for a CMF succession plan is based on many factors, but the most critical factor is organizational perceptions and suggestions from stakeholders concerning the qualities desired in a leader and the selection of future leaders. The board of directors, staff, and patrons who participated in the study have shared their perspectives and there is collective interest in future-oriented organizational development. The recommendation for succession takes into account the size of the organization and the lack of managerial resources. The recommendation for succession synthesizes the information gathered regarding succession planning, the organization, and the study participants. In general, scholars and practitioners distinguish between two types of strategic succession practices: emergency-based and departure-based succession management. The major difference between them is the expected versus unexpected character of the processes (Gothard & Austin, 2013).

A succession plan has the potential to thrust CMF into the rare space of a prepared small nonprofit organization. The recommendation for a succession plan lays out the fundamental tactics that would be needed in an effective plan for CMF. A proper succession plan aligns with a strategic vision of the organization. Aligning with the CMF vision, mission, and values ensures the plan is uniquely CMF and focused.

A summative tool for measuring the effectiveness of the organization going forward would be a new strategic plan focused on human capital development. The CMF succession plan recommendations address the themes that surfaced from participant feedback and CMF's general understanding of succession, but the study does not lay out a plan of action.

Top themes that emerged were the need for operational and leadership efficiency, as well as the theme that focused on organizational resource management, and a clear approach to CMF's future, including measured effectiveness. With the turnover in leadership, the clarity that the previous leader brought to the organization was lost, and participants expressed challenges with stakeholder buy-in and complete understanding of CMF's identity. Assessing the challenges that CMF will face in the coming years becomes a prelude for the following succession recommendation:

1. CMF should adopt a succession plan that aligns with the strategic vision of CMF and clearly states the mission, vision, and values of the organization.

2. One of the most important components of the succession plan would be staff capacity building through effective hiring and evaluation practices.

3. Intentionally designed onboarding practices should be prepared for new staff, along with off-boarding practices for departing staff and ongoing training initiatives that utilize organizational resources.

The next two themes focused on the CMF organization remaining relevant while maintaining organizational identity and history, along with the importance of structural stability in the environment. The succession recommendation for this theme would involve conducting a self-analysis of CMF's staffing needs and identifying resources required for business continuity. Based on the collected responses of the study participants, an interest in gathering a more in-depth understanding of CMF would enhance the efforts related to internal and external communication of organizational happening and culture/identity. CMF should develop an organizational leadership program that informally shares organizational changes and updates, while formally inviting interested internal and external stakeholders to participate in resource mapping and CMF identity development sessions.

The final theme heavily emphasized the culture of CMF, which is crucial for this small nonprofit organization. Culture is passed down through generations of staff and patrons, through rituals, traditions, and cultural navigators who understand the organization's history while simultaneously embracing the vision. The succession recommendation involves creating opportunities for cultural navigators to collaborate with internal and external stakeholders in passing along the organization culture. These opportunities could mirror traditional organizational cultural practices; orientations, on-

going communication through various forms of media, or gatherings where culture can be shared.

To achieve this, CMF should develop rituals and traditions-based experiences, such as annual recruitment events and organizational showcases, to harness the power of the community and contribute to the preservation of organizational culture. This would require the participation of the board, staff, and patrons to institutionalize effective practices (DiMaggio & Powell, 1983; Meyer & Rowan, 1977). Basic institutionalized practices, such as meeting structure and advisory committee meetings, would be highlighted to communicate their effectiveness in passing along organizational culture.

Evidence of Trustworthiness

This case study of a small nonprofit organization, with a small sample size of 11 participants, provides a model for approaching an organization in the consultative service context and provides recommendations for similar organizations. According to Nowell et al. (2017) transferability is linked to the ability to extend the applicability of research findings across diverse contexts and with different participant groups. Within the review of data comprehensive descriptions and tools were used to highlight the top responses enhancing transferability across diverse settings. This study incorporated self-reported questionnaires, participants provided answers from their perspective and their experiences. Identifying the specific categories of the participants, the research methodology employed in this study, in relation to the nonprofit environment, and the data collection approach would be the crucial factors in determining if the approach implored in this study would be transferable.

As shared earlier, to achieve dependability, a clear and concise documentation of the study process was shared (Nowell et al., 2017). The detailed portrayal of participants' perceptions of their experiences aims to bolster reliability. The data was collected using a structured questionnaire that required participants to give their consent before proceeding to answer the study questions. The structured format of the questionnaire provided consistency to support the study's trustworthiness (Nowell et. al., 2017). The collected data yielded consistent responses and conveyed the notion that the questionnaire exhibited face and content validity. Thematic analysis was conducted to review the data in a systematic manner (Nowell et. al., 2017). The thematic analysis maintains a very dependable and transferable study. However, the small study size limits the transferability of the study.

Upon reflection, themes emerged from the study that represented the collective perspective of CMF staff, board, and patrons. The questionnaire structure required participants to answer all questions, ensuring consistency in the study's implementation. Multiple participants shared similar thoughts on leadership and the importance of maintaining CMF's institutional relevance. As stated earlier, confirmability is essential for establishing the trustworthiness and accuracy of the research. In the end, the value lies in the assessed quality of qualitative studies in relation to how the data's meaning is made (Chowdhury, 2015; Nowell et al., 2016). Through inductive coding of the participant data, it became clear how important the long-standing leader has been to the organization. The accounts of the historical leader confirm the unique impact they had on CMF. The

salient memories and perspective of the leader provide validation for future

recommendations regarding organizational development practices.

Strengths and Limitations of the Study

One of this study's strengths is its contribution to the literature on succession

planning in small nonprofit organizations. However, it is important to acknowledge the

primary limitation of this single case study, which is restricted sample size (see Kennedy,

1979). This limitation makes it challenging to generalize the findings to a broader

population but is appropriate for an organizational study. Another strength would be the

size of the organization being studied. CMF, being a small organization with a diverse

range of social justice and community platforms, can serve as a valuable resource for

other small nonprofit organizations considering succession planning. This study may also

serve as a foundation for future research on small nonprofit organizations experiencing a

leadership transition.

Summary

In Section 4, I presented the study findings and identified themes based on the

responses of the study participants. Also, I provided a recommended strategy for

addressing these themes, while also recommending a strategy for succession. In Section

5, I will share how the results of the study will be distributed with the CMF leadership.

Section 5: Dissemination Plan and Conclusion

Dissemination Plan

The summarized results of this CMF study will consist of a multiple-page report that will be presented to the CMF leadership team. The board and staff will then determine the best approach for sharing the results within the CMF community. Based on responses to the questionnaire, I have listed the PAS recommendations in order of popularity, reflecting the emergent themes described in the study findings:

1. CMF should adopt a succession plan that aligns with the strategic vision of CMF and clearly states the mission, vision, and values of the organization.

2. One of the key components of the succession plan should focus on staff capacity building through effective hiring and evaluation practices. This includes selecting candidates with desirable qualities, providing comprehensive on-boarding for new hires with clear expectations and a general orientation to the organization's history, and implementing skill-building activities.

3. Establish intentionally designed on-boarding practices for new staff, develop off-boarding practices for departing staff, and implement on-going training initiatives that make use of organizational resources.

4. CMF should develop an organizational leadership program that informally shares organizational changes and updates, while formally inviting interested internal and external stakeholders to participate in resource mapping and CMF identity development sessions.

5. Foster the development of CMF rituals and traditions-based experiences, such as annual recruitment events and organizational showcases, that leverage the power of community and aid in passing along organizational culture. This would involve the active participants from the board, staff, and patrons to institutionalize effective practices (see DiMaggio & Powell, 1983; Meyer & Rowan, 1977). Examples of such activities include highlighting meeting structure and advisory committee meetings to communicate their effectiveness.

I will offer to further meet with the board after they have reviewed the findings and my recommendations to address any questions they may have about the study. I will also explain how the succession plan recommendations can inform their future decisions regarding succession planning and how succession planning also helps to mitigate issues of equity through planned structural change processes that allow for more opportunities for individuals to participate in the organization. Regardless of whether they decide to create a succession plan or not, I would be a resource.

I specifically designed this study to tackle the challenge of leadership transition within a small nonprofit organization. The target audience for this study would be other small nonprofit organizations interested in a framework for approaching succession planning. The questionnaire used in this study can be replicated and modified to suit the needs of an organization experiencing a leadership transition, enabling them to quickly gather insights and make informed decisions regarding organizational perceptions and the selection of future leaders.

Conclusions

The study findings will be shared with CMF, and the study will conclude once I have presented the recommendations. Following the conclusion of the study, CMF will have the opportunity to seek additional feedback regarding the questionnaire data. The insights derived from the study have been summarized and used to form the foundation recommendation.

Summary

CMF faced a significant leadership transition with the departure of a longstanding leader and the introduction of a new leader. This transition provided an opportunity for CMF to determine the critical characteristics required for their future leader. However, the absence of a clear succession plan posed a risk of operational and service disruptions in CMF's ongoing community work. It is important for all organizations to consider the impact of changes in organizational composition and growth (Miller-Millesen, 2003).

The lack of a succession plan poses challenges for all organizations but is particularly challenging for small nonprofit organizations like CMF. Very few nonprofits have prepared for leadership transition through effective succession planning strategies (Besel et al., 2021; Santora et al., 2015; Sargeant & Day, 2018). I conducted this study to identify perspectives and themes related to the lack of succession planning and help CMF in ensuring the continuity of its programs and services in the future.

The succession recommendations presented in Chapter 4 can serve as a starting point for the development of more formally crafted succession tools that can help CMF better serve its patrons and the community. If integrated into a succession plan, this

recommendation would provide a responsive starting point for the leadership team as they navigate the future of CMF.

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