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## Harmonizing Impact: Aligning Nonprofit Mission with Key Performance Indicators

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# Walden University

College of Management and Human Potential

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Mary Alice Dunphy

has been found to be complete and satisfactory in all respects,  
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the review committee have been made.

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Walden University  
2024

Abstract

Harmonizing Impact: Aligning Nonprofit Mission with Key Performance Indicators

by

Mary Alice Dunphy

MS, Saint Mary's University of Minnesota, 2005

BS, National American University, 2002

Consulting Capstone Research Project Submitted in Partial Fulfillment

of the Requirements for the Degree of

Doctor of Business Administration

Walden University

December 2024

## Abstract

Music school leaders struggle to balance delivering impactful programs with maintaining operational efficiencies. Developing effective strategies to address these inefficiencies is crucial for maximizing the impact of music education and ensuring long-term institutional success. Grounded in the Baldrige performance excellence framework, the purpose of this qualitative single case study was to explore the strategies nonprofit leaders use to identify holistic performance measurements to enhance operational efficiencies and effectiveness. The participants were three senior leaders of the school. Data were collected through semistructured interviews and an analysis of internal documents and archival data. Through thematic analysis, five themes were identified: (a) leveraging technology to enhance operations, (b) establishing performance metrics and prioritizing faculty development, (c) refining communication and financial management, (d) implementing robust systems for student information and partnership management, and (e) improving alum engagement. A key recommendation is to leverage technology to gain access to valuable data on student behavior and market trends, which can inform decision-making. The implications of social change include the potential for ABC School of Music to play a vital role in the community by providing access to music education, fostering cultural enrichment, and offering a creative outlet that can positively impact students' social and emotional well-being.

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## Dedication

To my dog, who kept my secret that I returned to school to finish my doctorate study. Remy was my one confidant who did not discourage me from expending energy in this pursuit. On a serious note, I dedicate this study to my grandchildren and heartily encourage them to follow their hearts and not leave it too late.

## Acknowledgments

I want to thank my committee for their unwavering support and belief that I could do this work. I am incredibly thankful for my chair, Dr. Meridith Wentz, and second chair, Dr. Peter Anthony. Their encouragement and patience during this journey have been appreciated, and even though this is a doctoral study, words do not express my gratitude adequately.

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## Section 1: Foundation of the Project

### **Background of the Problem**

In this study, I used the 2020-2021 Baldrige Excellence Framework to explore effective operational strategies that leaders of small nonprofits use to expand the methods of measuring organizational mission alignment, advancement of community services, and sustainable organizational growth success. There is a lack of a standardized scale for measuring repeatable results in qualitative evaluations of entity performance. Previous researchers have demonstrated several approaches that demonstrate variability. For example, Mas-Machuca et al. (2024) posited that internalizing the mission to achieve organizational performance would ultimately create an environment where its purpose would guide its strategies, operations, and culture. This alignment leads to enhanced performance, as every aspect of the organization contributes toward achieving its mission. A different approach was taken by Morais et al. (2020), who researched the same topic using a Delphi panel study and determined that a student, faculty, and stakeholder focus was the most critical aspect of academic library programs and services for ensuring quality. These two researchers demonstrated the lack of a standardized approach to develop qualitative metrics to measure success meaningfully beyond financial performance to include social impact and enable targeted strategies for mission alignment.

### **Business Problem Consulting Focus and Project Purpose**

The business problem is that nonprofit leaders lack strategies for identifying

holistic operational efficiencies and effectiveness. Therefore, this qualitative single case study explored strategies nonprofit leaders use to identify holistic performance measurements to enhance operational efficiencies and effectiveness. The research design included interviews with three senior leaders selected from the management team and the board of directors. Additional information was retrieved from the review of documents and artifacts provided by the client organization and from publicly accessible information.

I selected a focused population sampling method. This sampling method is also known as purposive sampling. In this non-probability sampling technique where researchers deliberately choose participants based on the target population's characteristics and the study's objectives (Campbell et al., 2020; Patton, 2015). I selected three leaders from the same Arizona nonprofit. Interviews were conducted telephonically, with weekly interviews of the main point of contact with subsequent follow-ups with a director and member of the board of directors. The conceptual framework selected was the Baldrige performance excellence framework.

### **Research Question**

What strategies do nonprofit leaders use to identify holistic performance measurements to enhance operational efficiencies and effectiveness?

### **Assumptions and Limitations**

#### **Assumptions**

Assumptions are the foundational beliefs taken to be true without evidence or

proof. These are the accepted truths researchers hold regarding the variables of a study (Kerlinger & Lee, 2000). Several assumptions were made in my study. The first assumption was the availability of subjects to interview and the availability of certain types of reports and documents. More generally, the assumptions were that this case was unique and complex and that the case study might uncover insights that a broader study may overlook. I also assumed that this single case is not static and would change over time. Those changes would lead to a deeper understanding of why those changes occurred and would provide insights into processes, dynamics, and outcomes. The final assumption was that in-depth knowledge of a single case would reveal more details than a superficial study of multiple cases.

### **Limitations**

Limitations are the variables or influences beyond the researcher's control that may affect the results or interpretation of the study (Simon & Goes, 2013). The limitations of my study included challenges to using the study to generalize the insights gained, as well as some of the subjective interpretations that may have influenced the reliability and validity to an unknown degree. Due to the unique context of this single case study, replication in a different setting or with other subjects to test for reliability may be a challenge.

### **Transition**

The lack of a standardized scale for measuring repeatable results in qualitative evaluations of entity performance was the basis for the general business problem. My

study was based on the business problem of nonprofit leaders' strategies to identify holistic performance measurements to enhance operational efficiencies and effectiveness. Defining the limitations and the assumptions was imperative for setting the proper lens for my study that realized the aspirations to create new knowledge. The following sections include a review of the literature and how it was applied to the business problem, how it was organized, project ethics, the nature of the project, and research methodology, leading to the project findings and professional conclusions.



## Section 2: Literature Review of Business Consulting Topic

### **A Review of the Professional and Academic Literature**

In researching the business problem that nonprofit leaders lack strategies for identifying holistic operational efficiencies and effectiveness, I used the following keywords: *Baldrige Performance Excellence Program, Performance Excellence Frameworks, Quality Management Principles, Business Excellence Models, Leadership and Management Practices, Continuous Improvement and Baldrige, Operational Excellence and Baldrige, Benchmarking and Baldrige Awards, Organizational Performance, and Baldrige, Case Studies on Baldrige Award Recipients, Nonprofits and Baldrige, Comparative Studies of Excellence Models, Innovation Management within Baldrige Framework, and Sustainability and Baldrige Performance Excellence*. The sources I accessed beyond the Walden University Library included academic databases such as PubMed, EBSCOhost, JSTOR, Google Scholar, and Scopus, and specific journal databases related to management and quality, which provided the most relevant scholarly articles and peer-reviewed publications on the Baldrige Performance Excellence Program (BPEP).

I organized the data using a formatted spreadsheet to capture the relevant information to avoid duplications and maintain relevance to my study. The literature was organized by describing the background information on the BPEP overview, highlighting the importance of performance excellence in organizations and the objectives of the literature review. I researched and captured the framework's historical context and

evolution and criteria's evolution (Williams & Tran, 2021). The core values and concepts of the criteria, the knowledge management of the workforce, operations, results, and integrations with other quality performance frameworks. This literature review also included the assessment methodologies and comparative analysis with other assessment tools (Zhang & Li, 2020). I examined the impact on organizations by reviewing case studies of award recipients with a specific focus on process and operational efficiencies. I also reviewed criticisms of the framework to understand potential limitations better and discern if there were trends for future considerations to evolve the criteria. This outline covered the historical context, the foundation of the theory, methodology, impacts on award winners, and critical perspectives. The literature review was done to provide a balanced analysis of the program and its contribution to performance excellence. To maintain compliance with Walden University Doctor of Business Administration (DBA) requirements, there are 179 sources in the literature review, of which 52% are published after 2019 and 63% are peer-reviewed.

### **Conceptual Framework**

The BPEP, developed by the National Institute of Standards and Technology (NIST), provides a comprehensive framework for organizations to achieve and sustain excellence in their performance. The Baldrige criteria for performance excellence, which outlines a set of core values and concepts, serves as the foundation for the program (NIST, 2020). The Baldrige criteria categories, comprising seven critical areas of leadership, strategy, customers, measurement, analysis and knowledge management,

workforce, operations, and results, form the basis of the framework (NIST, 2020). These categories ensure a holistic approach to organizational performance and are essential for continuous improvement.

The Baldrige framework emphasizes the significance of performance measurement and analysis by advocating using key performance indicators (KPIs) and relevant metrics for organizational assessment (NIST, 2020). This approach enables organization leaders to gain valuable insights into their performance and make informed decisions for improvement. Furthermore, the program strongly emphasizes leadership and governance, emphasizing the importance of visionary leadership, ethical behavior, and social responsibility (NIST, 2020). This emphasis encourages organizations to align leadership practices with organizational goals and values to promote an environment of transparency and accountability.

The customer-centric approach advocated by the Baldrige framework prioritizes understanding and addressing customer needs and requirements, as well as engaging customers to build loyalty and satisfaction (Baldrige Performance Excellence Program, n.d.). This focus on customer satisfaction and feedback drives product, service, and overall performance improvements. The Baldrige framework also highlights the significance of workforce engagement and development, promoting a supportive and inclusive work environment and investing in employee training and recognition (Kim & Park, 2022). This framework fosters employee empowerment and innovation, contributing to organizational success.

The Baldrige criteria have been applied in various industries, including healthcare (Martinez & Lopez, 2022; Mukherjee & Sharma, 2021), manufacturing (Singh & Patel, 2020; Widjajanto & Rimawan, 2021; Yang, 2021), education (Jones & Smith, 2021), non-profits (Johnson & Miller, 2020), and the public sector (O'Neil & Green, 2021; Parast & Golmohammadi, 2019). Chen and Wu (2023) studied the impact of the Baldrige criteria on quality management practices in the tech industry, finding that the criteria's focus on customer satisfaction, process management, and strategic planning improved quality outcomes (Brown & Davis, 2020). Evans and Moore (2020) presented case studies of Baldrige excellence in various industries, demonstrating the framework's applicability and the importance of aligning performance measurement with the Baldrige criteria (Goetsch & Davis, 2020). Johnson and Miller (2020) explored the use of the Baldrige framework to enhance innovation capabilities in nonprofit organizations, finding that the framework's focus on customer satisfaction, knowledge management, and workforce engagement supported innovation. Jones and Smith (2021) compared Baldrige award winners in the education sector, identifying critical practices such as stakeholder focus, strategic planning, and process management as drivers of excellence.

Overall, the Baldrige performance excellence program provides a comprehensive framework for organizational leaders to assess, improve, and achieve excellence in their performance. By promoting a holistic approach to organizational management and continuous improvement, the program is a valuable resource for organizations seeking enhanced competitiveness, resilience, and overall success. I focused on those aspects of

Baldrige that pertained to leveraging the Baldrige criteria for performance excellence for effectiveness. This included focus on the following foundational elements of the criteria: (a) measurement and analysis, (b) leadership and governance, (c) customer focus, (d) workforce engagement and development, and (e) strategic planning and performance improvement. Each of these areas is discussed in more detail in the following paragraphs.

Measurement and analysis are key components of the framework. The Baldrige framework emphasizes using KPIs and relevant metrics to measure organizational performance. This category emphasizes the importance of systematically collecting, analyzing, and interpreting data to gain insights that inform strategic decision-making and drive improvement. The importance of KPIs is a well-established concept in the literature. KPIs are essential for measuring organizational performance (Velimirović & Velimirović, 2011), highlighting their critical role in assessing how well an organization achieves its objectives. Similarly, recognizing the most important KPIs for a specific industry can significantly impact effectiveness (Parmenter, 2015; Seify, 2010). In addition to their organizational benefits, KPIs are crucial in measuring customer value from the customer's perspective (Setijono & Dahlgaard, 2007). This customer-centric approach to KPIs can provide valuable insights for improving products, services, and overall customer experiences.

When applying the framework, organization leaders use various data sources, including stakeholder feedback, process, and outcome measures, and leverage tools such as dashboards and benchmarking to facilitate analysis and learning (Eckerson, 2010;

Kerzner, 2022; Malik, 2005; Norris & Baer, 2013; Sheikh et al., 2022). Organizational leaders can use the structured framework to manage knowledge by sharing best practices, lessons learned, and innovative solutions (Pellegrini et al., 2020). By implementing a consistent and repeatable measurement and analysis system, organizational leaders can gain valuable insights into their processes, identify areas for improvement, and make data-driven decisions to enhance performance (Ford et al., 2014). This category emphasizes the importance of systematically collecting, analyzing, and interpreting data to gain insights that inform strategic decision-making and drive organizational improvement. By meeting the Baldrige criteria for measurement, analysis, and knowledge management, nonprofits can enhance their ability to measure performance, identify areas for improvement, and achieve their mission and goals (Smith & Rogers, 2023).

The Baldrige framework focuses on visionary leadership, ethical behavior, and social responsibility, providing a comprehensive framework for assessing and improving organizational leadership and governance (Blazey & Grizzell, 2021). The leadership category emphasizes the importance of senior leaders in setting direction, creating a culture of excellence, and promoting a commitment to stakeholders. Leaders who use the criteria communicate a clear and compelling vision, set challenging goals, and inspire and motivate the workforce (Baldrige Institute, n.d.) They also foster a culture of ethics, transparency, and accountability and ensure that the organization is a responsible citizen. The Governance and Social Responsibility category is particularly relevant to nonprofits,

as it addresses the role of the board of directors and the organization's relationship with stakeholders. (Ortega-Rodríguez et al., 2024). The board is responsible for fulfilling its fiduciary responsibilities, ensuring ethical governance, and overseeing the organization's strategy and performance. Furthermore, organization leaders using the framework consider the impact of their actions on society and the environment and demonstrate a commitment to sustainability (Bailey, 2020) and social responsibility (Ford, 2022). By meeting the Baldrige criteria for leadership and governance, nonprofits can enhance their ability to lead effectively, govern responsibly, and fulfill their mission and goals.

The customer category requires organizations to engage with customers, determine their needs and expectations, and design processes to meet and exceed those needs. Organization leaders who use the framework segment their customer base, gather voice-of-the-customer data, and use this information to create customer-focused processes and services (Vinyard, 2019). They also build customer relationships, ensure access and equity, and recover from defects and complaints. Furthermore, organization leaders use the framework to set customer-focused goals and track performance metrics such as customer satisfaction, loyalty, and retention. By meeting the Baldrige criteria for customer focus, nonprofits can deepen their understanding of their constituents, deliver high-quality services, and achieve their mission and goals (Poms, n.d.).

The workforce category emphasizes the importance of engaging, developing, and enabling the workforce to achieve its full potential (Baldrige Foundation Annual Reports, 2020-2023). Leaders who use the framework recruit, hire, and retain a workforce that

aligns with the organization's strategy and culture. They foster a work environment that promotes collaboration, innovation, and well-being and provide opportunities for learning, development, and career progression (NIST BPPIR, 2020). Performance management systems recognize and reward high performance, address underperformance, and promote continuous improvement. Furthermore, organization leaders gather and act on workforce data and feedback to build a more engaged and effective workforce (NIST, n.d.). Using the Baldrige criteria for workforce, nonprofit leaders can tap the full potential of their staff and volunteers, drive high performance, and achieve their mission and goals (NIST, n.d.).

The Baldrige criteria for performance excellence provide a comprehensive framework for strategic planning and performance improvement. The strategy category requires the leaders of organizations to develop a strategy that aligns with their stated mission, vision, and values that will position the organization for long-term success. Organizational leaders can address the framework by conducting an environmental scan to understand the organization's internal and external context, identify strategic challenges and advantages, and set strategic objectives. They develop action plans to achieve their strategy, allocate resources, and establish key performance indicators. Furthermore, organization leaders review and revise their strategies to stay relevant and competitive. The performance results category requires organization leaders to track and analyze performance data to assess progress toward their goals. Organizational leaders identify gaps, set targets for improvement, identify opportunities for innovation, and



share best practices across the organization. By meeting the Baldrige criteria for strategy and performance results, nonprofit leaders can develop a compelling strategy, drive continuous improvement, and achieve their mission and goals (NIST, n.d.).

### **Holistic Performance Measurement in Nonprofits**

Performance measurement in nonprofits is complex due to balancing multiple goals and stakeholder expectations. While traditional financial metrics provide some insights, they do not capture the full scope of a nonprofit's performance (Willems et al., 2014). Holistic performance measurement frameworks, therefore, are essential for nonprofits to assess their effectiveness and efficiency comprehensively (Moxham, 2009). For instance, Kaplan and Norton (1992) introduced the balanced scorecard (BSC) to provide a more balanced view by also measuring performance from three additional perspectives: customer, internal processes, and learning and growth, in addition to financial measures. Another framework for assessing nonprofit performance proposed by C. Lee and Nowell (2015) included dimensions such as organizational capacity, program quality, community engagement, and social impact. Ubaid et al. (2020) provided a systemic review of organizational excellence methodologies, resulting in a list of elements of organizational excellence. These elements provided a list of attributes to design meaningful measurements that align with business goals.

Several researchers have offered insights into nonprofit leaders' strategies to identify holistic performance measurements to enhance operational efficiencies and effectiveness. They cover topics such as the design and implementation of performance

measurement systems, factors influencing the use of performance measures, the impact of financial and social performance on organizational effectiveness, the use of data envelopment analysis for benchmarking, the role of human resources in performance, and the relationship between nonprofit capacities and effectiveness during the COVID-19 pandemic. The literature on nonprofit performance measurement strategies, operational efficiency, and leadership performance metrics since 2020 offers valuable insights into how nonprofit leaders can identify holistic performance measurements to enhance operational efficiencies and effectiveness. Based on the literature, the first step is understanding the organization well enough to design and implement a performance measurement system.

### ***Design and Implementation of Performance Measurement Systems***

Moura et al. (2022) identified key design and implementation factors for performance measurement in nonprofit organizations. The authors highlighted the importance of aligning performance measures with strategic objectives, involving stakeholders in the design process, and addressing internal resistance and external influences. The authors emphasized the need for a participatory approach to designing performance measurement systems by each nonprofit organization's defined unique context and goals. Success in implementing performance measurement systems within nonprofits depends on many factors, including the system's characteristics, operational efficiency, and performance metrics (Treinta et al., 2020).

### **Characteristics of Nonprofit Performance Measurement Systems.** Cestari and

Treinta (2022) examined the characteristics of nonprofit performance measurement systems, highlighting the importance of collaboration, strategic alignment, and continuous improvement. The authors noted that performance measurement systems should be flexible and adaptive to accommodate the dynamic nature of nonprofit work. C. Lee (2021) further emphasized the diverse purposes of performance information in nonprofits, including strategic decision-making, accountability, and learning and improvement.

**Nonprofit Operational Efficiency.** Khan and Siddiqui (2020) investigated the effects of financial and social performance on the scale and scope of nonprofit operations and social impact. The authors found that financial health and program outcomes are crucial for organizational effectiveness. Wang and Hamilton (2024) evaluated the relationship between nonprofit capacities and organizational effectiveness during the COVID-19 pandemic, highlighting the importance of adaptive capacity, technological capacity, and stakeholder engagement.

Data envelopment analysis (DEA) has emerged as a valuable tool for benchmarking nonprofit performance and assessing operational efficiency. Coupet et al. (2020) applied DEA to benchmark nonprofit performance, while Guajardo (2020) used DEA to assess the technical efficiency of public-funded nonprofit libraries. Oliveira et al. (2021) examined the performance of human resources in nonprofits, emphasizing the importance of effective HR management practices for organizational success.

**Nonprofit Leadership Performance Metrics.** Cestari and Treinta (2022)

highlighted leadership's role in designing and implementing effective performance measurement systems. Renz et al. (2024) provided a comprehensive overview of nonprofit leadership and management, including the importance of performance measurement and accountability. Blevins and Schweinle (2022) examined the relationship between corporate governance and performance in nonprofits, emphasizing the importance of board oversight and leadership for organizational effectiveness. Wang and Hamilton (2024) also highlighted the crucial role of leadership in building nonprofit capacities for organizational effectiveness during times of crisis. Finally, Dicke and Ott (2023) provided a comprehensive overview of nonprofit governance, leadership, and management, emphasizing the importance of performance measurement and accountability in the context of rapid external change.

### ***Implications for Nonprofit Leaders***

Researchers offer several key implications for nonprofit leaders seeking to identify holistic performance measurements to enhance operational efficiencies and effectiveness (Carman & Nesbit, 2010; Speckbacher, 2011). First, performance measurement systems should be carefully designed and implemented with the involvement of key stakeholders (Moura et al., 2022). Second, performance measures should be aligned with the organization's strategic objectives and unique context (Collins, 2018). Third, nonprofit leaders should recognize the diverse purposes of performance information, including strategic decision-making, accountability, and learning and improvement (Lee, 2021). Fourth, data envelopment analysis and other

benchmarking tools can help assess operational efficiency and identify areas for improvement (Mahmoudi et al., 2020). Fifth, effective HR management practices are crucial for nonprofit performance (Oliveira et al., 2021). Finally, leadership is critical in designing and implementing performance measurement systems, building organizational capacities, and governing the organization for long-term success (Papulová et al., 2021).

Previous researchers have highlighted emerging themes related to the Baldrige framework, such as its impact on organizational sustainability (Radfar & Safaei, 2022), innovation (Ahmad & Schroder, 2019; Johnson & Becker, 2022), employee engagement (Reyes & Maragh, 2023), and supply chain management (Santos et al., 2019). Overall, the body of literature demonstrates the broad applicability and benefits of the Baldrige framework in guiding organizations toward performance excellence (Bailey, 2022). The researchers highlighted critical factors in successful implementation, such as leadership commitment and a focus on continuous improvement (Strahan et al., 2022). Emerging themes include the potential of the Baldrige criteria to drive organizational sustainability, innovation, and employee engagement (Bailey, 2022).

The previous researchers highlight the importance of a holistic and strategic approach to performance measurement in nonprofits. By aligning performance measures with organizational goals, involving stakeholders in the design process, and recognizing the diverse purposes of performance information, nonprofit leaders can use performance measurement as a tool for continuous learning and improvement. Furthermore, nonprofit leaders can enhance operational efficiency and effectiveness by leveraging benchmarking

tools and prioritizing effective HR management practices. As the nonprofit sector continues to evolve in response to external challenges and opportunities, the ability to measure and manage performance will be increasingly important for organizational success and sustainability.

### ***Enhancing Operational Efficiencies***

Nonprofit leaders can leverage the Baldrige framework, DEA, Lean Six Sigma, BSC, and other performance excellence models to enhance operational efficiencies. Golden et al. (2012) applied DEA to examine the efficiency of nonprofits in directing resources toward service delivery and fundraising, demonstrating the potential of DEA as a tool for benchmarking nonprofit efficiencies. Additionally, Privett and Erhun (2011) highlighted the importance of auditing to ensure the reliability of nonprofit efficiency reports, given that funders often base their decisions on these reports.

Overall, while there are areas of convergence in the literature, there are also points of divergence and potential conflict that suggest a need for further research and nuance in our understanding of nonprofit performance measurement strategies, operational efficiency, and leadership performance metrics. I will discuss the convergence, divergence, and conflicts within the literature, beginning with points of convergence.

**Points of Convergence.** The researchers agreed on the importance of stakeholder involvement, the role of leadership (Wang et al., 2019), and benchmarking in performance measurement systems. Moura et al. (2022) emphasized the importance of

stakeholder involvement. Freeman (1984) developed stakeholder theory as a framework used in business ethics and organizational management to identify and address the interests and needs of various groups with a stake in a company's actions and performance. Stakeholders can be internal to an organization (employees, managers, and shareholders) or external (customers, suppliers, communities, and the environment). The theory suggests that organizational leaders are responsible for considering the impacts of their decisions and actions on all stakeholders, not just shareholders. This approach can lead to more ethical and sustainable business practices, long-term success, and profitability.

The BPEP also emphasizes the importance of stakeholder focus, leadership, and benchmarking for achieving organizational excellence. The Baldrige framework requires organizations to engage with stakeholders, determine their requirements, and design processes to meet those needs (NIST, n.d.). Stakeholder engagement is essential, involving stakeholders in critical processes and eliciting their feedback (Baldrige Foundation Annual Reports, 2020-2023). Baldrige emphasizes visionary leadership, strategic direction, and governance (Baldrige Institute, n.d.). Leaders who use the framework define and drive the organization to exceed stakeholder requirements and achieve value. Benchmarking is critical to maintaining a competitive edge (Coupet et al., 2020). The Baldrige framework helps organizations assess performance, identify strengths and opportunities for improvement, and leverage best practices (ASQ, n.d.). Organizational leaders who use the framework conduct self-assessments against the

Baldrige criteria, identify strengths and weaknesses, and set goals (Baldrige Institute, n.d.). Organizations can achieve the Baldrige criteria and performance excellence by focusing on stakeholders, leadership, and benchmarking.

Multiple researchers, including Cestari and Treinta (2022), Renz et al. (2024), Blevins and Schweinle (2022), and Wang and Hamilton (2024), highlighted the crucial role of leadership in designing and implementing performance measurement systems governing the organization, and building capacities for effectiveness. Chiarini and Brunetti (2019) compared successful implementations of lean production; they found the importance of strategic alignment, leadership commitment, and employee involvement for successful implementation of lean production; these are factors also emphasized in the Baldrige framework.

The following are examples of researchers that agree on success attributes. Radfar and Safaei (2022) studied the relationship between the Baldrige framework and organizational sustainability in the energy sector, finding that the framework's focus on customer satisfaction, process management, and strategic planning supported sustainability. Santos et al. (2019) developed a vendor-managed inventory (VMI) model in supply chain management, highlighting the importance of partnership and collaboration. Tang and Tan (2020) compared quality awards, recognizing the importance of leadership, strategy, and process management criteria. Stading and Vokurka (2003) discussed the implications of the Baldrige criteria for strategic planning and performance measurement, emphasizing the importance of aligning these processes with the



framework's principles. Parast and Golmohammadi (2019) examined quality factors that influence the adoption of the Baldrige framework in the healthcare sector that have broader implications for quality management in the public sector. Yang (2021) found that top management commitment, organizational culture, and resources are vital to successful adoption and identified critical success factors for implementing the Baldrige criteria in manufacturing, including leadership commitment, employee involvement, and process management.

Another area of convergence of ideas was the use of benchmarking tools. Coupet et al. (2020) and Guajardo (2020) applied DEA to benchmark nonprofit performance and assess operational efficiency, demonstrating DEA's utility as a performance measurement tool in the nonprofit sector. Wang et al. (2019) explored the role of information technology (IT) in achieving organizational results within the context of the Baldrige Award. By leveraging technology effectively, nonprofits can enhance their operational efficiency, effectiveness, and overall impact.

**Points of Divergence.** Researchers disagree on the focus, specific metrics, and role of human resources in performance measurement systems. While Moura et al. (2022) focused on designing and implementing performance measurement systems, Cestari and Treinta (2022) examined the characteristics of existing performance measurement systems in nonprofits. This divergent view suggests a shift in the literature from focusing on the initial design and implementation of performance measurement systems to examining their ongoing characteristics and impact.

Metrics was another area where ideas diverged. The metrics for operational efficiency, as found by Khan and Siddiqui (2020), emphasized the importance of both financial health and program outcomes for achieving organizational effectiveness, while Wang and Hamilton (2024) highlighted the importance of adaptive capacity, technological capacity, and stakeholder engagement for nonprofit effectiveness during the COVID-19 pandemic. The BSC proposed four interconnected perspectives.

The first BSC perspective is financial, with defined objectives for revenue growth, profitability, return on investment, and shareholder value. Creating value for the customers is measured by satisfaction, market share, customer retention, and product and service attributes. The third perspective relates to internal processes. This includes objectives related to operational excellence, core competencies, and process capabilities. The final learning and growth perspective pertains to the organization's innovation, learning, and improvement capacity (Stanley, 2021). These objectives relate to the skills, knowledge, technology, and culture (Kaplan & Norton, 1992). This variety of metrics suggests that the metrics for operational efficiency may vary depending on the specific context and challenges facing the organization (Mangla et al., 2020).

The role of HR was also an area without complete consensus. Oliveira et al. (2021) emphasized the importance of effective HR management practices for nonprofit performance, while this factor was not explicitly addressed in the other studies. Franco-Santos and Otley (2018) analyzed performance management research. They noted the involvement of different roles, such as HR managers, strategy managers, and

management accountants, implying a potential omission of HR's specific role. Wood (1999) reviewed studies on high-involvement/performance management and noted omissions involving elements of job design, which is a key HR responsibility. Stringer (2007) reviewed 120 field studies on performance management and called for an integrated and longitudinal approach, which could include a more explicit focus on HR's role. Prowse and Prowse (2010) critically explored the evidence on the contribution of human resource management to performance and questioned what happened to HR performance. Gerhart et al. (2000) discussed measurement errors in research on the human resources and firm performance relationship and agreed that high-performing firms may have omitted variables relevant to HR's impact. This suggests that the role of resources in nonprofit performance may be an area for further exploration in the literature. These were examples where studies diverged. There were also indications of conflicting points of view.

**Conflicting Points of View.** Research on performance management reflects ongoing debates about its effectiveness. Some researchers suggest that competency-based talent management practices have evolved rapidly, potentially enhancing performance management (Pulakos et al., 2019). Others highlight important unanswered questions about the effectiveness of performance management, indicating a need for further research (Schleicher et al., 2019). The COVID-19 pandemic has brought additional challenges and opportunities, with some arguing that adapted performance management strategies can help organizations navigate crises and thrive afterward (Aguinis & Burgi-

Tian, 2021). However, other research emphasized the need to consider the broader systems context in which performance management operates to understand its impact fully (Schleicher et al., 2018). Overall, the impact of performance management on employee performance remains a topic of investigation, with findings from 2015-2020 suggesting both positive and negative effects (Almulaiki, 2023).

There was conflicting research regarding the purpose of performance information. While C. Lee (2021) emphasized the diverse purposes of performance information, including strategic decision-making, accountability, and learning and improvement, Blevins and Schweinle (2022) focused primarily on the role of performance information for accountability and governance. This suggests a potential tension among researchers between viewing performance measurement as a tool for internal learning and improvement versus external accountability.

Another conflicting area centered around the impact of governance. Blevins and Schweinle (2022) found a positive relationship between corporate governance and performance in nonprofits, while Renz et al. (2024) noted that the impact of governance on nonprofit performance is complex and contingent on various factors. This suggests that the relationship between governance and performance may be more nuanced than is often acknowledged in the literature. There are implications for research and gaps in the literature based on the comparison and contrast of divergent and conflicting points of view.

### **Implications for Research and Improvements in Business**

The literature could benefit from more longitudinal studies that examine the long-term impact of performance measurement systems on nonprofit effectiveness. While some researchers have examined the initial design and implementation of performance measurement systems, there is a need for more research on their ongoing use and impact over time (Aboramadan et al., 2021); future researchers should consider the role of contextual factors in shaping nonprofit performance measurement strategies and outcomes. For example, the metrics for operational efficiency may vary depending on the organization's specific mission, size, and scope and the external environment in which it operates.

Several researchers have suggested that the metrics for operational efficiency may vary depending on an organization's specific mission, size, scope, and the external environment in which it operates, even in recent years. For instance, Nudurupati et al. (2021) discussed how the external environment can influence changes in the focus and scope of performance measurement and management practices. Obloj and Sengul (2020) found that performance metrics differ in their alignment with an organization's mission and its economic activities. Hristov et al. (2021) emphasized that achieving environmental integration in performance management systems depends on the internal and external environmental context. Lastly, Miceli et al. (2021) highlighted the importance of a multidimensional vision of resilience that considers whether organizations can adapt to changing times.

Previous researchers suggest a need for more research on the role of human resources in nonprofit performance (Baluch & Ridder, 2021). More research is needed on how nonprofits use performance information in practice. C. Lee (2021) notes that more research is needed to investigate how nonprofit organizations use performance information. Pfiffner, Ritz, et al. (2021) suggested that more research is needed to understand how nonprofits use performance information under financial stress. FitzGerald (2020) called for more research to explore nonprofit executive performance information use dimensions. The literature could benefit from more explicit consideration of how performance measurement strategies and metrics may perpetuate or address issues of equity and inclusion in nonprofits.

### **Impact on Organizational Performance**

Previous researchers have found a positive impact on organizational performance when leaders apply frameworks such as C. Lee and Nowell's framework, BSC, and Baldrige. C. Lee and Nowell (2015) have informed theory development and future research on strategic choice in performance. The framework has been applied in empirical studies on networks, highlighting the need for more attention to external performance measures (Asiaei et al., 2021). In the context of social impact, the framework emphasized the importance of focusing beyond just resource provision; they argued that networks need to align with internal and external stakeholder expectations to achieve their goals (Arsad et al., 2015). The framework has been adopted in studies on using performance measures in nonprofits, highlighting the effects of funders and the

diversity of performance measures used (Lee, 2021). Overall, Lee and Nowell's framework has contributed significantly to the understanding and assessment of performance in nonprofit organizations, influencing both research and practice in the field (Arsad et al., 2015; Asiaei et al., 2021; Lee, 2021; Lee & Nowell, 2015;).

When implemented, the BSC (Kaplan & Norton, 1992) promoted sustainable development by enhancing organizational performance (Rafiq et al., 2021). The impact of the BSC on performance varies by organization size, product life-cycle stage, and market position (Hoque & James, 2000). In the banking sector, the BSC has positively impacted performance (Tuan, 2020). The BSC has been widely adopted as a framework for strategic management and performance measurement (Kaplan, 2009). Implementing the Baldrige criteria has improved various aspects of organizational performance, including quality, productivity, customer satisfaction, employee satisfaction, and financial performance (Ghosh & Das, 2021; Loh, 2022; Smith & Brown, 2018).

Researchers highlight emerging themes related to the Baldrige framework, such as its impact on organizational sustainability (Radfar & Safaei, 2022), innovation (Ahmad & Schroder, 2019; Johnson & Becker, 2022), employee engagement (Reyes & Maragh, 2023), and supply chain management (Santos et al., 2019). Overall, the body of literature demonstrates the broad applicability and benefits of the Baldrige framework in guiding organizations toward performance excellence.

In addition to the Baldrige emerging themes, there are additional themes regarding the importance of sustainability and how it relates to business excellence

(Jankalová & Jankal, 2020), the role of big data analytics in achieving operational excellence and improving sustainable supply chain performance (Bag et al., 2020), the implementation of Lean Six Sigma for operational excellence in digital emerging technology companies (Lameijer et al., 2021), the importance of integrating business excellence models across different sectors and types of businesses (Saoudi & Dehane, 2020). There is a need for businesses to implement the Baldrige criteria for performance excellence in order to achieve excellence (Fok-Yew & Aziati, 2022).

### **Conclusion**

While the literature provided valuable insights into nonprofit performance measurement strategies, operational efficiency, and leadership performance metrics, several areas warrant further research and consideration. By addressing these gaps and building on the existing knowledge base, researchers can enhance our understanding of how nonprofits can use performance measurement frameworks for continuous learning, improvement, and success. Balancing performance measures efforts that align various metrics with organizational goals and objectives, ensuring that all measures support strategic priorities. This creates a harmonizing performance measure; organizations can simplify their measurement approach, reducing complexity and improving the ease of data collection and analysis.

The harmonization of performance excellence programs holds significant promise for enhancing organizational performance. By integrating the structure of a defined framework, organizations can gain a more comprehensive understanding of their



performance and identify areas for improvement (Arah et al., 2003; Rabin et al., 2012).

The Baldrige criteria provide a foundation for strategic planning and performance excellence, highlighting key areas like leadership, strategy, and customer focus (Ford & Evans, 2000). Implementing excellence frameworks with knowledge management and sustainability principles can support sustainable innovation and long-term success (Barrantes-Briceño et al., 2024). By harmonizing scores from multiple criteria, organizations can gain a more unified view of their performance and track progress over time (Saen, 2010).

### **Transition**

Section 2 included a review of the professional and academic literature and how it was applied to the business problem. Previous researchers provided valuable insights into nonprofit leaders' strategies to identify performance measurements that enhance operational efficiencies and effectiveness. Key themes included aligning metrics with organizational mission and goals, leveraging frameworks such as the BSC and Baldrige criteria (Ratri et al., 2020), and considering stakeholder perspectives. Data-driven approaches, benchmarking, and continuous improvement methodologies like Lean Six Sigma are also emphasized. Furthermore, previous researchers highlighted the need for leaders to foster a culture of transparency, accountability, and learning and to ensure that performance information is timely, relevant, and actionable. By adopting these strategies, nonprofit leaders can create robust performance measurement systems that drive operational excellence and, ultimately, more significant social impact.

The following sections contain the research project ethics, the nature of the project, population sampling and participants, data collection activities, data organization and analysis techniques, reliability and validity, and research methodology leading to the project findings and professional conclusions.

### Section 3: Research Project Methodology

#### **Capstone Research Project Ethics**

My role as a researcher included study design, formulation of the research questions, defined objectives and methodology, and alignment with the study's goals and ethical standards. My activities included data collection from semistructured interviews and document analysis from public sources and client provided sources. I analyzed the data collected from the participants to explore themes and insights. I used reflection to manage my preconceived assumptions to reduce that influence. I then drew conclusions and recommendations based on the analyzed data, mindful of the ethical considerations necessary for ethical research. I have not had experience working in the nonprofit sector or had any previous relationships with the participants of this study.

I used the core principles as outlined in the *Belmont Report* (U.S. Department of Health, Education, and Welfare, 1979). The *Belmont Report* has three core principles. The first is respect for persons as it applies to informed consent. Ethical considerations include the elements of informed consent, where participants must be fully aware of the purpose, procedures, benefits, and their right to withdraw at any time (Galletta, 2013). I obtained this consent with a countersigned service order agreement. The second core principle of the *Belmont Report* is beneficence, or the principle of minimizing harm and maximizing benefits. I initially contacted the client when I explained the purpose, procedures, benefits, and the right to withdraw. The third core principle is justice, specifically the fair distribution of research benefits and burdens. This transparency was

crucial for building trust and demonstrating respect for persons as it pertained to cultural background and values.

Walden University paired me with an organizational leader from a nonprofit as part of the consulting capstone process. My research project included consent from each participant. Consent is a form of protection for the participant against possible unethical acts by the researcher (D.S. Lee, 2018). The consent form for this study clearly outlined the risks, benefits, and ability to withdraw from the study at any time. A person could withdraw from this study via phone or e-mail; the contact information was on the consent form. I obtained an e-mail from participants as consent to participate. No incentives were offered to the participants, and this is also outlined on the consent form. I assured the interviewees of confidentiality, and no identifying information was included in the study. Confidentiality is necessary in qualitative research designs (Patton, 2015).

I stored and secured all data collected during this study and used a password-protected encrypted laptop. I stored paper documentation and the computer in my locked home office. I will keep these from the study completion date and the approval of the Chief Academic Officer (CAO) for 5 years. Confidentiality and ethical protection are relevant to all research. Participant confidentiality is paramount when exploring socially sensitive subjects. In this study, I did not include socially sensitive material. Each interviewee received an identifier of either P1, P2, or P3 to maintain the confidentiality of the participants. I used a recording application and an iPhone to record each interview. I deleted the iPhone recording after member checking was completed. I also used a journal

on my laptop to record notes and information. This enabled me to make notes to provide additional context and details for the study narrative. These notes were another method to validate the emerging themes. After 5 years, all documentation, identifying information, electronic data, and any data associated with the study will be destroyed. The Walden University Institutional Review Board (IRB) approval number for this study was 04-02-21-0027798.

### **Nature of the Project**

This study was a qualitative single case study of a nonprofit organization. I focused on the identified strategies for areas needing improvement to enhance operational effectiveness objectives. Researchers use the qualitative method to discover the why and how using nonnumerical data (Saunders, 2016). A single case study was the most appropriate research design as I studied a single organization to gain in-depth contextual knowledge of my client organization. Yin (2018) stated that a case study is most appropriate in determining the how and why of the subject of the study and provides an understanding of the subject in a holistic and real-life context. Stake (1995) defined a case study as a well-bounded, specific, complex, and functioning thing. This single case study produced a description and report on the single case themes by analysis of the interviews and artifacts of a bounded system. I interviewed three client leaders and analyzed available artifacts and documents, allowing for the exploration of strategies the nonprofit leaders can use to identify holistic performance measurements to enhance operational efficiencies and effectiveness.

The data gathered from multiple sources were used to triangulate the findings, increasing the research's validity and reliability. The qualitative single case study data was studied through the Baldrige performance excellence framework. This framework provided guidance and focus to explore new ideas about operational performance for this single-case nonprofit organization.

### **Population, Sampling, and Participants**

Participants in this study included three leaders from one nonprofit organization. For this study, the participants were chosen by my client leader executive director as critical links in the chain, including being empowered to make decisions. These participants were the executive director, the operations manager, and the registrar for the client organization, who make policy and hiring decisions. The executive director chose participants who could provide the most beneficial information for the research topic. I interviewed the experts on the study topic. The interview setting for the research was over a Zoom meeting.

The initial contact was via email, where I introduced myself and described my background and study. The client shared their background and high-level description of the organization. The client was very responsive and chose to set up the weekly Zoom sessions to coordinate with recordings and shared those with me post-meeting. This approach was agreed upon to accommodate their schedule. Each week, I provided the session agenda for the following session to provide time for considered responses.

The sampling method used in this qualitative single case study was purposeful or

purposive. This sampling involved selecting participants who provided pertinent information relevant to the research questions (Patton, 2015). With purposeful sampling researchers choose individuals or groups knowledgeable or experienced in the subject under study (Creswell & Poth, 2018). The strategic selection in my study of the three most qualified leaders led to higher-quality data. These chosen leaders were the most knowledgeable and experienced and provided the richness in quality of the data. I reached data saturation when I heard no new ideas or themes and redundancy in patterns (Guest et al., 2006).

### **Data Collection Activities**

I was the primary collection instrument, conducting semistructured interviews with the participants and analyzing documents. I used the Baldrige excellence framework as a primary tool for data gathering. The semistructured interviews allowed me to gather detailed information from the participants on closely aligned study topics. I used a recording application on my laptop. The audio recording assisted with accurate transcription of the interviews and also helped with identifying themes. This was useful in the member-checking phase as well. The recording and interview allowed for the establishment of trust and rapport with the participant. I used audio recordings of the interviews to capture and transcribe the interviews accurately and verbatim. It also provided the ability to review and capture more details that may have been missed during the live recording.

The advantages of interviews in qualitative case studies are that they facilitate in-

depth responses and exploration of complex topics (Kvale & Brinkman, 2009). I could probe deeper into individual experiences, perspectives, and concepts while gaining a deeper understanding of the topic. The flexibility of the interviews was organic information gathering, allowing me to adapt to the respondent's perspective and pursue interesting or unexpected lines of inquiry. These interviews provided the detailed information. They provided narratives and personal stories that added context and nuance to the context in which participants operated, which assisted in practical data interpretation. I asked about specific incidents or experiences that lead to a richer understanding of the phenomena under consideration. This direct interaction between interviewer and participant established trust, facilitating openness and honesty in responses. The challenges were biases and time commitment from me and the interviewee.

I also gathered institutional documents and electronic information related to the nonprofit as additional data sources. This is considered secondary data, as it was not initially created for research. This secondary research provided valuable data for a more comprehensive view of the organization. I included information on public data found in different online databases. I also used document analysis. I reviewed existing documents related to the case, such as reports, administrative records, news articles, correspondences, and other relevant written materials, including mission and vision statements. These documents provided historical depth and insights into past events, relationships, and patterns. The institutional records were not created for research



purposes, so they offered a more authentic view of the nonprofit under study. The document analysis is often less resource-intensive and, therefore, more cost-effective as it does not require arranging meetings with participants and traveling. Many of these documents were publicly available and accessible online, making analysis convenient as my client organization was not close to me geographically. Documents also provide permanence as the content does not change so that they can be reanalyzed many times for additional review and corroborative analysis. The combination of these methods provided a comprehensive qualitative case study.

I used member checking to ensure the reliability and validity of the data. Member checking, also known as participant validation, is where a researcher returns the summary findings to verify accuracy and resonance (Birt et al., 2016). I followed up with the study participants by providing summary transcripts and surfaced themes for their review. These summaries were emailed to the participants for their review and clarifying comments. I employed triangulation to ensure validity by using multiple data sources, including interviews, documents, data from credible electronic media, and reports. Establishing validity is necessary to establish the credibility of the data collection.

The data collection began with a service agreement, including the right to withdraw. The client and I signed this service order. The data collection in this qualitative single case study consisted of semistructured interviews of three client leaders who were interviewed individually. These interviews for the main point of contact were held weekly for over three months, while the others were held in one session for 60 minutes.

The interview protocol was the same for all participants for consistency (see Appendix B). This semistructured interview approach, along with an analysis of organizational and public documents for data saturation and identification of themes.

### **Data Organization and Analysis Techniques**

Data organization and analysis are critical processes in research. Organizing makes the data manageable and analyzable (Miles et al., 2014). I followed Yin's (2014) 5-step process that outlines a systematic analysis and synthesis of data. These steps were as follows: 1) compile the data, 2) disassemble the data, 3) reassemble the data, 4) interpret the data, and 5) conclude by connecting the findings to the research objectives.

All collected data were held in my locked home office. Each interviewee received an identifier of P1, P2, and P3 to maintain confidentiality in the study results. Storage of the personal information for the anonymized identifiers was separated from the collected data and was accessible only to me. As the researcher, I have securely stored this information for 5 years. After 5 years, I will destroy all study data. I anonymized each person's interview and identity using a secure method.

I used a recording application and an iPhone to record each interview. I deleted the iPhone recording after member checking was completed. I also used a journal on my laptop to record notes and information. This enabled me to make notes to provide additional context and details for the study narrative. These notes were another method to validate the emerging themes after the color coding of the themes. To compile the data, I created an Excel spreadsheet for resources and uploaded the transcripts of the interviews.

To disassemble the data, I then examined and interpreted the data to identify patterns, insights, and relationships. Next, I reassembled the data by coding the emerging themes to organize the study results by category. The organizational documents provided by the client leader supported the pattern matching. For this pattern matching, I used methodological triangulation to cross-verify findings.

Methodological triangulation involves multiple research methods to improve the reliability of the data (Denzin, 2017). I summarized the key findings that answered the research question and included my final insights as practical recommendations. I used a with-in method to obtain my data. The with-in method is an approach to data collection in research using multiple forms of data collection or multiple sources of evidence within a single consistent methodological framework. (Patton, 2015). I chose this approach to enhance the validity and reliability by cross-verifying information gathered using different techniques within the same methodology strategy, in this case, a qualitative single case study. One source was the semistructured interviews and team interaction and the organizational documents provided. I collected detailed data aligned with the Baldrige performance excellence framework in the semistructured interviews and compared responses to organizational documents for alignment.

### **Reliability and Validity**

In this research, I adopted measures to ensure the reliability of its findings using member checking of the interpretation of the data, member checking, and triangulation of the collected data by reviewing available relevant documentation. These measures

ensured the consistency of results upon replication in similar contexts. Reliability is paramount to affirm the credibility and dependability of the research outcomes, thus providing a solid foundation for the study's theoretical and practical implications.

Data collection procedures were standardized to further bolster the reliability of the study. To minimize variability, all participants received the exact instructions and were subjected to similar conditions during the data collection phases (Creswell & Creswell, 2017). This approach aligns with recommendations by Bernard (2017), who emphasized the importance of procedural consistency in qualitative research to enhance reliability.

### **Validity**

Validity in qualitative research refers to the appropriateness of the tools, processes, and data used to ensure the credibility of the findings. This research adhered to credibility, transferability, dependability, and confirmability as the cornerstone for ensuring validity (Leung, 2021). Several strategies were used to enhance the credibility of the findings. First, prolonged engagement and persistent observation in the field allowed for in-depth understanding and verification of data (Creswell & Miller, 2000).

Triangulation of data sources, including interviews, observations, and documentary analysis, further supported the study's robustness (Denzin, 2017). Confirmability was achieved by member checking of data interpretation (Ahmed, 2024), who also posited that member checking and other methods of confirmability enhance credibility. Data saturation was achieved when no new information was found after exhaustive research.

### **Transition and Summary**

In Section Three, I described the purpose of this study, the role of the researcher, the participants, and the research method and design. I listed the tenets of ethical research and discussed reliability and validity. In Section Four, I will use the BPEF to explore the details of my client organization. The BPEF criteria provided the basis on which I could determine the organizational profile of my client. An organizational profile is an overview of the critical factors of an organization that provide a foundation for recommendations. I used the seven categories: leadership, strategy, customers, measurement, analysis, knowledge management, workforce, operations, and results. I was able to identify positive practices, opportunities for improvement, and recurrent themes. I concluded this section with an executive summary overview of the study's contributions and recommendations for future research.

## Section 4: Research Project Findings and Professional Conclusions

### **Organization Profile**

This qualitative single case study explored strategies nonprofit leaders use to identify holistic performance measurements to enhance operational efficiencies and effectiveness. The ABC School of Music (ASM) exemplifies the principles of artistic excellence, accessibility, and collaboration within a community music organization. The school is pivotal in cultivating musical appreciation and skills among a broad demographic through diverse programs and a commitment to inclusivity. This case study illuminates the school's multifaceted contributions to Arizona's cultural ecosystem and its potential as a model for music education and community engagement initiatives. Thematic analysis revealed five themes: leveraging technology to enhance operations, establishing performance metrics and prioritizing faculty development, refining communication and financial management, implementing robust systems for student information and partnership management, and improving alum engagement. These themes underscore the school's commitment to ongoing improvement and its potential for growth and increased impact.

### **Organizational Description**

The organization is a 501(c)(3) nonprofit organization. This designation is granted by the Internal Revenue Service to exempt specific organizations from federal income tax. In general, 501(c)(3) organizations are charitable, educational, scientific, literary, or religious. As a 501(c)(3) nonprofit, donations to the organization are tax-deductible. The

organization is eligible for grants from foundations and other funding sources supporting only 501(c)(3) entities.

The organization is a nonprofit community music school in Phoenix, Arizona, dedicated to harnessing the transformative potential of music by providing exemplary music education and communal engagement. The organization's multifaceted programming includes private lessons, facilitating one-on-one instruction with seasoned pedagogues; a College Prep Program, a specialized curriculum designed to optimize students' readiness for collegiate music studies; and a diverse array of group classes, catering to learners of all ages and proficiency levels. Additionally, it offers various music courses encompassing advanced placement (AP), music theory, Royal School preparation, music appreciation, and pedagogy. As evidenced by its substantial online presence, with over 2,300 adherents and 1,700 visitors on Facebook, the organization plays a vital role within the local community.

### ***Product Offerings***

The organization's programmatic offerings are private lessons, facilitating one-on-one instruction with seasoned pedagogues; a college prep program, a specialized curriculum designed to optimize students' readiness for collegiate music studies; and a diverse array of group classes. They encompass diverse educational opportunities, each critical in fulfilling the organization's mission and its service to the community.

Private lessons include one-on-one instruction with experienced pedagogues, integral to its educational model, facilitating personalized growth and development. This

focused attention enables students to progress quickly, addressing specific technical and musical challenges. As the core of the organization's educational offering, private lessons provide a high level of customization and direct mentorship, aligning with research emphasizing the efficacy of personalized instruction in music education.

The college prep program is a specialized program vital to its mission, as it prepares students for collegiate music studies' academic rigor and performance expectations. By offering a targeted curriculum, the organization navigates aspiring musicians through the competitive landscape of college admissions, ensuring they possess the requisite skills and knowledge to excel at the postsecondary level. This program underscores its commitment to its students' long-term musical development and career aspirations, recognizing that music education can profoundly impact individuals' lifelong trajectories.

Providing diverse group classes and accommodating students of all ages and skill levels embodies the organization's leaders' commitment to inclusivity and accessibility. Group instruction fosters a sense of camaraderie among students, encouraging collaborative learning and the communal sharing of musical experiences. Additionally, group classes provide a more affordable entry point for families, enhancing the accessibility of high-quality music education and aligning with its community-focused mission.

Specialized music courses exemplify the organization's dedication to offering a well-rounded music education. AP and Royal School programs prepare students for the



technical rigor of standardized exams, providing external validation of their musical proficiency. Conversely, music appreciation and pedagogy courses cultivate a nuanced understanding of music's historical and cultural contexts and the pedagogical skills necessary to impart musical knowledge to others. This breadth of course offerings enables the organization leaders to cater to the diverse interests and objectives within its student body, acknowledging that music education encompasses technical skill-building and musical understanding and appreciation.

Through this multifaceted array of programs, the organization fulfills its mission to “unleash the power of music” by providing educational pathways for students at various stages of their musical journey. From introductory group classes to specialized preparation for collegiate studies and beyond, the organization ensures students receive the individualized attention and comprehensive knowledge necessary to thrive as musicians. Ultimately, the organization's programmatic offerings play a vital role in enriching the community through music education, fostering a lifelong appreciation of the arts, and recognizing the transformative potential of musical engagement.

### ***Mission, Vision, Values, and Culture***

The organizational mission, vision, and values underscore its commitment to providing accessible, high-quality music education that empowers students and families. The mission is “To unleash the power of music by providing high-quality music education and experiences to students and families.” This statement emphasizes the organization's dedication to making music education accessible and impactful for the

community it serves.

Although a concise vision statement is not explicitly provided, the vision can be inferred as aspiring to be a leading provider of music education in the Greater Phoenix area, empowering youth and families through the transformative power of music. As articulated by the interviewed principal, the core values encompass the following principles: courage, safety, and error tolerance, teamwork, honesty and trust, dedication and passion, leadership, and self-belief. These values reflect the organization's commitment to cultivating a supportive, inclusive environment that nurtures personal growth, collaboration, and musical development. They underscore the importance of safety, integrity, and self-confidence in the learning process, aligning with research emphasizing the role of positive organizational cultures in promoting student engagement and outcomes. The organization's core competencies align with its mission statement (Table 1).

**Table 1***Organization's Core Competences and Relationships to its Mission*

Core Competency	Description
Expert music instruction	<ul style="list-style-type: none"> <li>• The faculty consists of experienced music educators, providing students with high-quality instruction.</li> <li>• This competency directly supports the mission by ensuring students receive the musical guidance needed to grow and develop their skills.</li> </ul>
Diverse program offerings	<ul style="list-style-type: none"> <li>• Providing various programs, including private lessons, group classes, and specialized courses, catering to different interests, ages, and skill levels.</li> <li>• This diversity of offerings aligns with the mission to make music education accessible, providing multiple pathways for students to engage with music in a way that suits their needs and goals.</li> </ul>
Community Engagement	<ul style="list-style-type: none"> <li>• As a community music school, the organization firmly commits to serving the broader Phoenix area with programs and initiatives that foster connection with the local community.</li> <li>• This competency supports the mission by extending the reach of music education and experiences beyond the school's walls, enriching the community's cultural life.</li> </ul>
Student-Centered Approach	<ul style="list-style-type: none"> <li>• The programs and values emphasize students' holistic development, safety, courage, and self-belief.</li> <li>• This student-centered approach directly aligns with the mission to unleash the power of music in students' lives, recognizing that music education cultivates technical skills, personal growth, and confidence.</li> </ul>
Adaptive Capacity	<ul style="list-style-type: none"> <li>• The organization's ability to adapt its programs and offerings in response to community needs and trends demonstrates a capacity for organizational agility.</li> <li>• This competency supports the mission by ensuring that it remains a relevant and responsive provider of music education, able to evolve with the changing needs of the students and families it serves.</li> </ul>

These core competencies demonstrate how its strengths and capabilities enable it to fulfill its mission to provide high-quality, accessible music education that empowers students and enriches the community. These competencies serve as the foundation upon which the organization builds its programs and services, ensuring that the organization remains a vibrant and impactful presence in the landscape of music education.

***Workforce Profile***

Table 2 provides an overview of workforce segments, detailing essential qualifications that align with the school's strategic goals.

**Table 2***Work Segment Descriptions and Qualifications*

Workforce Segment	Description	Qualifications
Administrative Staff	This group includes employees responsible for the operational and administrative functions of the organization, such as program management, registration, finance, marketing, and human resources. They play a crucial role in supporting the educational programs and ensuring the smooth operation of the school.	Bachelor's degree in a relevant field like business administration, nonprofit management, education administration, or the arts. Coursework or experience in program management, marketing, finance, and human resources may be beneficial. Some roles, like executive leadership positions, require a master's degree or equivalent experience.
Teaching Faculty	The faculty comprises the music educators who deliver the instructional programs, including private lessons, group classes, and specialized courses. This group includes a mix of full-time faculty, part-time instructors, and some adjunct or visiting faculty. Faculty members come from diverse musical backgrounds and bring various teaching and performance experiences.	Bachelor's degree in music or music education; a master's or doctoral degree may be required or preferred for some positions. Performance experience and teaching certification (if applicable) are usual essential qualifications. Faculty teaching specialized courses, like music theory or pedagogy, may need advanced degrees in those areas.
Support Staff	This segment includes employees who provide support services that facilitate the operation of programs, such as front desk personnel, facilities staff, and support for technology in its instructional and administrative operations.	A high school diploma or equivalent is the minimum requirement for many support staff roles. Some positions, like front desk or customer service, may require an associate's degree or college coursework in a relevant field. Technical support roles may require specific IT certifications, degrees, or related fields.
Volunteers	As a nonprofit, the organization engages volunteers in various capacities, such as assisting with events, providing administrative support, or serving on advisory committees. Volunteers are a valuable resource in supplementing the work of paid staff and fostering community engagement.	Educational requirements will depend on the nature of the volunteer role. Some positions may require specialized skills or knowledge, while others may be open to volunteers of all backgrounds. Volunteers are provided Training or orientation to prepare them for their roles and responsibilities.
Interns and Student Workers	The organization offers internship or student worker positions, providing opportunities for students and emerging professionals to gain experience in music education administration. These individuals can contribute to the organization's operations while developing their skills and knowledge.	Enrollment in a relevant degree program (high school, undergraduate, or graduate) is typically required for internships and student worker positions. The specific educational requirements will depend on the nature of the internship or student worker role and the skills and experiences it is designed to provide.
Board Members	While not employees per se, the board of directors plays a critical role in governing the organization, setting its strategic direction, and overseeing its financial and operational health. Board members come from diverse backgrounds and bring various skills and perspectives to their governance roles.	While there may not be specific educational requirements for board membership, a bachelor's degree or equivalent experience is often expected. Diversity of backgrounds, skills, and perspectives is essential for a well-functioning board, so individuals from various educational and professional backgrounds are usually sought.

By recognizing these workforce segments, the organization leaders can develop targeted strategies for recruiting, developing, and engaging its employees, acknowledging that different groups may have distinct needs, motivations, and contributions to the organization's mission. The essential workforce requirement is the commitment to provide high-quality, accessible music education while implementing the organization's programs and services. The workforce characteristics include a mix of full-time staff, part-time faculty, and adjunct instructors or teaching assistants. The organization's size and structure are relatively flat organizational hierarchy, with administrative staff supporting the educational programs and faculty.

The workforce is diverse in age, gender, and musical background, reflecting the inclusive nature of the organization's mission and programs (see Figure 1). This workforce profile provides an overview of the organization's workforce's size, composition, qualifications, diversity, engagement, development, and capacity. It identifies strengths, challenges, and opportunities for improvement in workforce management and development.

# Figure 1

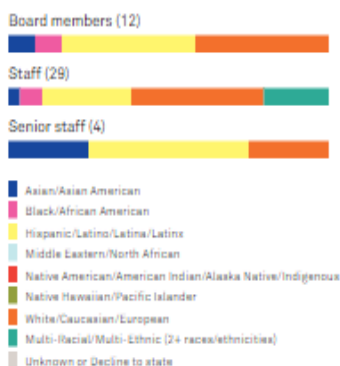
## Workforce Demographics

### Leadership

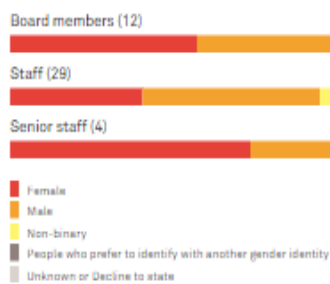
The organization's leader identifies as:

<b>Race &amp; ethnicity</b>	Hispanic/Latino/Latina/Latinx
<b>Gender identity</b>	Female, Not transgender
<b>Sexual orientation</b>	Heterosexual or Straight
<b>Disability status</b>	Person without a disability

#### Race & ethnicity



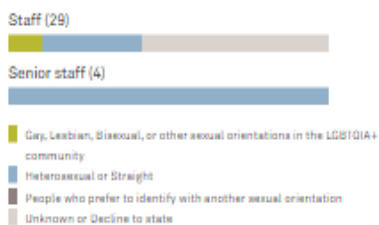
#### Gender identity



#### Transgender Identity



#### Sexual orientation



#### Disability

No data

Note. Guidestar.org profiles

The 2022-2023 impact report notes that it was a “tremendous growth” year for the organization, with new programs, a significant increase in students served, and instruction hours provided. This growth necessitated hiring additional faculty and staff to meet the demand for programs and services. While the core programs like private lessons and the College Prep Program remain, the organization introduced new offerings. ASM adapted existing ones to respond to evolving student needs and interests. For instance, mentioning a “learning center” in the impact report suggests potential expansion into new instructional formats or areas of focus. Such changes influence the types of skills and expertise required within the workforce.

### *Assets*

Table 3 describes the organization’s assets, significant facilities, equipment, technologies, and intellectual property.

**Table 3**

### *Assets, Significant Facilities, Equipment, Technologies, and Intellectual Property*

Assets	Asset Description
Facilities	The organization leases a 19,694-square-foot facility comprised of private and group lesson rooms, a performance auditorium, and administrative offices. These facilities provide appropriate spaces for private lessons, group classes, rehearsals, performances, and administrative functions. The specific nature of these facilities influences the types of programs offered and the overall learning and working environment.
Musical Equipment and Instruments	As a music school, it has a wide range of musical instruments and equipment for instruction and performances. This includes pianos, string, woodwind, brass, percussion instruments, and technology like amplifiers, soundboards, and recording equipment. The quality and maintenance of this equipment are essential for providing high-caliber music education.
Technologies	Besides musical equipment, the organization utilizes various technologies to support its operations and programs, including administrative software for managing registrations, scheduling, and student records—learning management systems (LMS) or online platforms for delivering virtual lessons and courses, marketing and communication tools for outreach and engagement with the community audiovisual technologies for performances, recitals, and live-streamed events equipment for recording student performances, helpful to for assessments, auditions, and feedback.
Intellectual	Curriculum and Educational Materials are valuable intellectual property, such as the



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Property	organization's proprietary teaching methods, program curricula, and educational resources. These are protected through copyright law and agreements with faculty, staff, and learning partnerships with other entities.
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### ***Regulatory Environment***

An analysis of the key regulations, standards, and requirements that apply to the organization areas includes the Occupational Health and Safety (OSHA) regulations. The organization leaders must comply with all relevant OSHA regulations governing workplaces in the United States. This includes standards for general industry Part 1910 Health and Safety and potentially specific standards for the education sector. COVID-19 Guidelines: The organization must adhere to the current COVID-19 guidelines from the Centers for Disease Control and Prevention (CDC) and the OSHA to minimize workplace transmission risk.

**Ergonomics and Injury Prevention.** Given the physical demands of music performance and instruction, the need to implement measures to prevent injuries, such as providing ergonomic equipment and promoting healthy playing and teaching techniques, has been addressed. As well as emergency preparedness. The organization has emergency response plans, including procedures for fires, earthquakes, and other potential hazards.

**Accreditation, Certification, or Registration.** The organization leaders partner with a community college to offer accredited, college-level coursework. Additionally, the organization is the only affiliate of a high-profile music college in Arizona, a prestigious institution in the music education field. These partnerships suggest that the education provided by the organization meets specific standards for accreditation that include

faculty teaching in public schools or specific private school settings that may need to hold state teaching certification or specific endorsements in music education and business registration as a nonprofit, the organization must be registered with the appropriate state authorities and have any necessary licenses and permits to operate a music school.

**Industry Standards.** The National Standards for Music Education and The National Coalition for Core Arts Standards (NCCAS) have established standards for music education that can guide curriculum design and instruction. Adherence to established best practices in music education and membership and participation in professional organizations like the National Association for Music Education (NAFME) and the Music Teachers National Association (MTNA) provide resources and guidelines on best practices in music teaching and learning.

**Regulations.** The organization has practices for responsible management and disposal of waste, including any hazardous materials like broken instruments or electronic equipment. Facilities comply with the Americans with Disabilities Act (ADA) to ensure accessibility for students and staff with disabilities. As a 501(c)(3) nonprofit, it must comply with all relevant financial regulations, including charitable solicitation, tax reporting, and financial transparency. The organization receives grants and complies with the requirements of the granting entities and federal regulations like the Uniform Guidance (2 CFR 200) for receiving federal funds. Minimal product safety applies. The organization ensures that musical instruments and equipment are safe for students and staff to use and comply with any product safety standards or regulations applicable to

musical instruments and equipment.

## **Organizational Relationships**

### ***Organizational Structure***

The organization has an executive director and a board. The board includes a board governance chair. Other leadership roles include the executive director, administrative supervisor, development associate, community outreach coordinator, two program managers, registrar, group class and facilities coordinator, and front desk associates. The remaining roles are teaching artists, interns, and volunteers.

As for governance structure, the organization has a board of directors that oversees the organization's activities. The board has various committees to focus on specific areas such as finance, governance, and events/outreach, as is common in non-profit governance structures. Table 4 shows the reporting relationships among the organization's governance board, senior leaders, and partner organizations.

**Table 4***Key Reporting Relationships*

Title	Role	Reporting relationships
Executive Director	The organization's executive director provides overall strategic and operational leadership.	The executive director reports to the board and provides strategic and operational leadership. The executive director oversees a team of senior staff leaders responsible for managing different areas of the organization, such as program directors, development staff, and operations staff.
Board of Directors	The board includes a president, an event committee chair, a treasurer/secretary, a board governance chair, a litigation associate, a financial advisor, a deputy chief communications office, a vice president of engineering, a globe inclusion and diversity director, VNSA representatives, student representative, talent human resources, trainer and success leader, consultant/asset manager, economic advisor, chief investment officer. The board oversees governance, sets the organizational vision, and supports fundraising and other vital activities.	The board provides oversight, sets the organizational vision, and supports fundraising and other essential activities.
Committees	The board has various committees focused on specific areas, such as finance, governance, events/outreach, and development, which support the board's work and the implementation of the organizational strategy.	The board committees, such as the finance, governance, and events/outreach committees, support the board's work and the implementation of the organizational strategy.
Staff Leadership Team	In addition to the Executive Director, a team of staff leaders is responsible for managing different areas of the organization, such as program directors, development staff, and operations staff.	The senior staff leaders report to the Executive Director and manage their respective areas of the organization.
Partnerships	The organization has partnerships with other organizations, such as a local Community College and a prestigious College of Music, which are essential components of its leadership system in providing educational opportunities and enhancing its reputation.	Partners and affiliates have a close relationship regarding educational programming and accreditation. These relationships are essential components of the organization's leadership system in providing educational opportunities and enhancing the organization's reputation.
Volunteer Engagement	The organization engages volunteers in various ways, such as through its board and committees, event support, and potentially tutoring or mentoring programs, which helps to build a broader community of support for the organization.	

### *Customers and Stakeholders*

Table 5 outlines the key market segments for products. Moreover, services are mapped to the customer groups and their expectations.

**Table 5**  
*Customers and Stakeholders*

Key Market Segments/Products and Services	Customer Groups	Stakeholder Groups & Expectations
<p><b>Private Lessons:</b> The organization offers personalized private lessons in various instruments and voice for all levels.</p>	<p><b>Amateur Adult Musicians:</b> Personalized Learning: Customized lesson plans tailored to individual skill levels and goals. Flexibility: Evening and weekend classes to accommodate work schedules. Community: Opportunities for social interaction and group learning. Resources: Access to practice rooms, instruments, and learning materials. Ongoing Support: Assistance is available for technical issues or learning challenges.</p> <p><b>Professional Musicians:</b> Advanced Training: Specialized courses and masterclasses to enhance skills. Networking: Opportunities to connect with other professionals and industry experts. Certification: Recognized credentials and certificates upon course completion. Career Development: Workshops and seminars on music business, marketing, and entrepreneurship.</p>	<p><b>Faculty and Staff:</b> Professional Development: Ongoing training and opportunities for career advancement. Work Environment: Supportive and collaborative workplace culture. Resources: Adequate teaching materials, instruments, and facilities.</p>
<p><b>Group Classes:</b> The organization provides introductory group classes for beginning musicians.</p>	<p><b>Students and Parents:</b> Quality of Instruction: High standard of music education with experienced, certified teachers. Range of Programs: Diverse courses to cater to different ages and skill levels. Convenience: Flexible scheduling, online learning options, and convenient locations. Progress Tracking: Regular</p>	<p><b>Board of Directors:</b> The Board provides governance oversight and supports the organization's mission. Strategic Vision: Clear direction and long-term planning for organizational growth. Financial Health: Transparent financial reporting and effective use of funds. Compliance: Adherence to regulatory standards and ethical guidelines.</p>

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<p><b>College Prep Program:</b> The organization has a unique and immersive College Prep Program for high school students.</p>	<p>updates on student progress and milestones. <b>Support Services:</b> Accessible customer support for scheduling, billing, and general inquiries. <b>Safety:</b> Safe and secure learning environment for children. <b>Schools:</b> The organization partners with schools to provide music programs, making schools a customer group.</p>	<p><b>Partners:</b> Organizations such as a local Community College and the prestigious College of Music are partners and provide opportunities for students. <b>Community Partners expect:</b> <b>Collaboration:</b> Joint initiatives that benefit both the organization and the community. <b>Shared Goals:</b> Programs aligned with community needs and interests. <b>Communication:</b> Regular updates and open lines of communication. <b>Donors:</b> Donors support the mission and programs through their financial contributions. <b>Requirements:</b> Donors may have specific requirements regarding impact reporting, financial transparency, and mission alignment. <b>Donors and Sponsors Expect:</b> <b>Impact Reports:</b> Evidence of how their contributions are making a difference. <b>Recognition:</b> Acknowledgment in the organization's publications and events. <b>Stewardship:</b> Responsible and transparent use of donated funds. <b>Volunteers:</b> Volunteers support the programs and events.</p> <p><b>Alums:</b> <b>Engagement:</b> Ongoing connection through events, newsletters, and social media. <b>Opportunities:</b> Access to further training, networking, and performance opportunities. <b>Involvement:</b> Chances to give back through mentorship or donations.</p>
<p><b>Early Childhood Music Programs:</b> The organization offers music programs for young children.</p>		
<p><b>Summer Camps:</b> The organization provides summer music camps for students. <b>Merchandise:</b> The organization sells branded merchandise such as caps, backpacks, hoodies, and t-shirts.</p>		
<p><b>Customer Support Services:</b></p>		

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The organization provides contact information, including an address, phone number, and email address for inquiries. The organization offers a parent portal for online tuition payment and resource access. The organization is active on social media platforms such as Facebook, Instagram, and Twitter, which, at times, can be used for customer support and communication.

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*Note.* These are the organization's key market segments, customers, and stakeholder groups. The specific strategies for targeting and serving these groups are challenging as there are differences in their objectives.

### ***Differences Among Groups***

Students and parents prioritize foundational education, flexibility, and safety, while professional musicians need advanced training and career development resources. Donors and Sponsors look for impact reports and recognition, whereas community partners focus on collaborative benefits and shared goals. Faculty and staff require professional development and a supportive work environment. At the same time, the board is concerned with strategic vision and financial health.

### ***Suppliers, Partners, and Collaborators***

The organization has several key suppliers, partners, and collaborators in its mission to provide high-quality music education. The Arizona Piano Wholesale LLC is mentioned as a supplier that can order new pianos directly from selected suppliers and manufacturers and help negotiate lower prices.

A significant partner is the prestigious College of Music. The organization is a proud partner of a City Music Network. With their support, the organization has sent



students to Boston each summer for the Aspire: Five-Week Music Performance program. Other listed program partners include a local Community College, The Nash/Jazz in AZ, Grand Canyon University, and Fervor Records, which supports local musicians.

Significant collaborators include the New England School and the University of Phoenix College of Arts Sciences and Technology, which have provided additional weight to the organization's reputation and credibility. The additional partnerships with local schools provide music education programs and outreach, the National Endowment for the Arts, local businesses that provide sponsorships and community events, music equipment suppliers for instruments and sound equipment, local artists and musicians may offer workshops or performances, and educational institutions for their collaborative programs and student resources.

These suppliers, partners, and collaborators of the organization play a crucial role in producing and delivering its key products and customer support services and in enhancing its competitiveness in several ways. Suppliers like Arizona Piano Wholesale LLC provide the organization with the musical instruments necessary for teaching and learning. Access to high-quality instruments is essential for delivering private lessons, group classes, and ensemble programs.

The College of Music and City Music Network contribute to developing the organization's programs, notably the College Prep Program. This support also enables the organization to offer its students the opportunity to attend the Aspire: Five-Week Music Performance program in Boston. The partnerships with a local community college and

Grand Canyon University provide access to additional instructional expertise and resources, enhancing the quality of education, and the organization can offer competitive advantages in the music education market.

### ***Competitive Advantages***

Partnerships with renowned institutions like the prestigious College of Music and New England School enhance the organization's reputation and credibility in the community. These collaborations with colleges and universities provide access to additional facilities, technologies, and resources that organizations might be unable to afford independently. The unique collaborations and opportunities offered through the partnerships can differentiate its programs from those of other music schools and conservatories in the region.

The suppliers, partners, and collaborators are vital in enabling the organization to deliver high-quality music education programs, provide valuable opportunities for its students, and establish itself as a leading music school in Phoenix. The organization's suppliers, partners, and collaborators contribute significantly to and implement innovations in several ways. Suppliers of musical instruments and equipment provide the organization access to the latest technological advancements, such as digital pianos, music software, and online learning platforms. These tools can enhance teaching methods and teach students new ways to learn and practice music. Suppliers offer innovative musical instruments or specialized equipment that allow the organization to expand its program offerings or provide unique learning experiences. For example, access to diverse

ethnic or orchestral instruments can enable the organization to offer courses in world music or orchestral ensembles.

Partners like the prestigious College of Music, focusing on contemporary music, introduced the organization to innovative teaching methods and curricular approaches that enhance its programs. This includes techniques for teaching songwriting, music production, and improvisation. Collaborations with academic institutions like the local Community College and Grand Canyon University provide the organization access to the latest music education research, informing best practices and program development.

Partnerships with organizations like The Nash/Jazz in AZ and Fervor facilitate collaborations between musicians from different genres, leading to innovative performances and learning experiences that blend various musical styles. Working with specific artists and musicians can bring new creative perspectives and ideas to the organization's programs. These collaborations lead to the development of innovative performances, compositions, or workshops that push the boundaries of music education. Collaborations with individual artists and small ensembles allow the organization to develop specialized programs and workshops tailored to collaborators' unique skills and expertise.

## **Organizational Situation**

### ***Competitive Environment***

The organization is a significant provider of music education in the Phoenix area, with a notable reputation and several indicators of its relative size and growth. The

organization serves over 1,000 students annually across Greater Phoenix. 2022-2023, the organization served 2,136 students with over 12,812 hours of direct instruction, indicating a year of tremendous growth. According to its social media profile, the organization has 51-200 employees. A significant highlight in the organization's growth was being selected by a prestigious College of Music in Boston as part of the City Music Network in 2010. The organization has experienced growth by adding its Learning Through Music program, as noted in its impact report.

**Competitive Position.** Based on customer feedback, the organization appears to have an enormously positive reputation overall. With a sliding tuition scale, the organization provides market-rate lessons, lessons on financial aid at a reduced rate for families in need, and private music lessons on full scholarship. The College Prep Program is one of the most prestigious in the country, as evidenced by its National Arts and Humanities Youth Program Award. Students were chosen as one of six Masterclass participants nationwide at the Berklee City Music Network Summit.

While the organization is notable in the Phoenix area, it is smaller than some top-ranked music schools and conservatories nationally. For example, the Jacobs School of Music at Indiana University Bloomington is the largest accredited music school in the nation. A prestigious College of Music, one of the organization's key partners, is also significantly more prominent and widely recognized globally. However, the organization's strong reputation, growth, and industry recognition position it as a leading music education provider in its regional market.

The organization has several competitors in the Phoenix area and Arizona more broadly. Community music schools like Desert Ridge Music Academy: This school offers music lessons and programs for all ages and skill levels. Prestige Music Academy: This academy provides music lessons and challenges students with opportunities to earn rewards. Scottsdale Music Academy: This academy offers music lessons and programs for students. School of Rock Arcadia combines individualized music lessons with group band rehearsals. Rosie's House: A Music Academy for Children: This academy provides music education to children from underserved communities.

The competitive landscape is diverse, with different types of organizations offering music education programs in the Phoenix area. Several fundamental changes are affecting the competitive situation of the organization, creating both opportunities and challenges:

The global online music education market was valued at USD 12,283.47 million in 2022 and is projected to reach USD 62,291.83 million by 2032, growing at a CAGR of 17.63% (Business Research Insights, n.d.). The market is estimated to grow at a CAGR of 18.2% from 2023 to 2032 (Medium, n.d.-a). Online music education is anticipated to reach US\$ 829.15 million by the end of 2031, growing at a CAGR of 18.4% from 2021 to 2027 (Astute Analytica, n.d.).

Immersive technologies like virtual reality (VR) and augmented reality (AR) allow students to experience concerts, performances, and music theory lessons in virtual environments (Medium, n.d.-b). Online platforms and music education apps are

transforming music education, making learning and collaboration more accessible and efficient (S3DA Design, n.d.). Music pedagogy is rapidly changing through the adoption of technology, gamification, and personalized learning (Sundial, n.d.).

There is a growing interest in popular music genres like hip-hop, and students are creating their original songs (The 74 Million, n.d.). The challenges in traditional music education include declining music education participation and the number of music teachers in some regions (The 74 Million, n.d.). They casualized workforce models that do not support the development of music teachers (ISM, n.d.). These changes present opportunities for the organization to innovate and adapt its programs but also require strategic planning to remain competitive. The growth of online music education platforms and technology integration into teaching methods are trends the organization can leverage to enhance its offerings. However, the school must also be aware of the challenges and disruptions these changes may bring to the traditional music education landscape.

**Competitiveness Changes.** ASM is a mid-sized music school with a strong reputation for quality instruction and community engagement. The school differentiates itself through its accessibility and inclusivity. The COVID-19 pandemic has accelerated the shift to online music education, increasing competition from virtual music schools. There is also growing competition for funding and resources among non-profit organizations. ASM benchmarks its programs and operations against peer music schools nationally. The school tracks key performance indicators (KPIs) such as student enrollment, retention, satisfaction, financial performance, and fundraising success.

ASM's strategic plan focuses on expanding programs, enhancing faculty development, and increasing community partnerships. The school aims to increase its reach and impact while maintaining its commitment to quality and accessibility. ASM has a system for regularly assessing and improving its programs and operations. The school collects and analyzes data on key performance indicators (KPIs) and conducts regular reviews and assessments. Feedback from students, faculty, and other stakeholders informs continuous improvement efforts.

**Comparative Data.** The key sources of comparative and competitive data available from within the music education industry. Growjo analyzes the organization's competitors, including Santa Cruz Catholic School, MC Productions, Music Works Northwest, Academy of Canada, Lippert Music Centre, Hooper's School of Music; funding could be challenging. Other music education programs or institutions in the Phoenix area may offer similar programs, creating competition for students and resources (University of Phoenix College of Arts Sciences and Technology, n.d.).

### *Strategic Context*

**Strategic Advantages.** The organization leaders utilize a community center model, actively promoting arts and music education. This could foster strong community ties and support. The organization offers a unique College Prep Program, which could be a differentiator and attract students aiming for higher education in music. The AP Music Theory accreditation could enhance students' academic profiles. The organization's commitment to providing music education regardless of socioeconomic status could

allow it to tap into a diverse talent pool and build a strong reputation for inclusivity.

### ***Performance Improvement System***

Components of the organization's performance improvement system, including evaluating and improving key organizational projects and processes. The organization's mission is to "unleash the power of music by providing high-quality music education and experiences to students and families." This mission guides the development of specific, measurable goals for performance improvement. The teaching artists can access ongoing professional development. This suggests a commitment to continually enhancing the skills and knowledge of staff to improve educational programs and processes.

The organization leaders assess its programs (private lessons, College Prep Program, group classes, summer camps, etc.) to evaluate their effectiveness in achieving its mission and goals. The organization tracks individual student progress and program outcomes through regular lessons, performances, and potentially formal assessments to identify areas of strength and those needing improvement.

**Process Improvement Processes.** The organization leaders engage in continuous process improvement, refining its operational processes and educational programs based on feedback, assessment results, and changes in the needs of its students and the broader community. The partnerships, such as its affiliation with the prestigious College of Music, provide opportunities for benchmarking, sharing best practices, and improving programs and processes.



## **Leadership Triad: Leadership, Strategy, and Customers**

### **Leadership**

#### *Senior Leadership*

ASM's senior leadership team, comprised of the executive director and program directors, sets the organizational vision and strategy. Leaders foster a culture of collaboration, inclusivity, and continuous improvement. They model the organization's values and inspire and motivate the workforce to achieve excellence.

**Mission, Vision, Values.** ASM's leadership guides the organization in fulfilling its mission and vision. Under the guidance of its leadership, ASM has established the organization as a vibrant community music school, serving over 2500 students of all ages with a diverse range of music courses. The school's leadership plays a crucial role in shaping the organization's strategic direction, programs, and community partnerships to advance its mission and vision in music education.

ASM senior leaders play a vital role in setting and deploying the organization's vision and values. They have defined a clear mission and vision that shape the organization's overall direction and purpose. Specific core values include a commitment to excellence in music education, accessibility, and the personal development of students. ASM's leadership team develops strategic plans to achieve the organization's vision, setting goals, objectives, and initiatives that align with the mission and vision.

This is accomplished by prioritizing resources, programs, and partnerships that support these strategic objectives. Senior leaders model the behaviors and values they

expect from others, fostering a culture that embraces the power of music, values diversity, and promotes excellence in music education. Effective leaders are skilled communicators. They clearly articulate the vision, mission, and values to all stakeholders, including staff, faculty, students, parents, and the broader community. Regular communication helps ensure everyone understands their role in achieving the organization's vision. ASM's leadership develops and supports programs that align with the vision and values, offering a range of music programs that cater to different interests and skill levels, making high-quality music education accessible to the community.

Leaders establish performance metrics and goals that support the organization's vision. They provide feedback and coaching to staff and faculty to ensure everyone is working towards common objectives. Performance evaluations and professional development opportunities align with the organization's values and strategic direction. Senior leaders build partnerships with schools, music industry organizations, and community groups to advance ASM's mission and vision. They engage with the community to understand needs, provide outreach, and showcase the impact of music education.

By setting a compelling vision and values and deploying them effectively throughout the organization, ASM's senior leaders inspire and guide the team to make a meaningful difference in the lives of students and the broader community through music education. The leaders of ASM demonstrate their commitment to legal and ethical behavior through several actions. While a specific "code of ethics" document is not listed

on the website, ASM's website states that they model respect, kindness, and integrity in their community of practice. ASM must comply with relevant laws and regulations governing non-profits as a not-for-profit organization. The board of directors carries out the legal and fiduciary responsibilities of the organization.

ASM's programs and teaching practices likely adhere to standards for music education, ensuring high-quality instruction for students. This includes following guidelines from professional music education associations. The school conducts its operations with ethical business practices for non-profit organizations, including transparency, accountability, and stakeholder respect. By establishing clear policies, demonstrating transparency and accountability, respecting privacy and safety, and adhering to industry standards, ASM's leaders set a strong tone for ethical and legal behavior within the organization. These actions help build trust with students, families, staff, and the broader community and ensure the school's long-term sustainability.

**Communication.** The senior leaders of the ASM communicate and engage with the entire workforce, key partners, and key customers through internal communication to clearly articulate the organization's mission, vision, and values, ensuring all staff and faculty understand the organization's purpose and direction. Leaders provide regular updates on the organization's progress, achievements, and challenges, helping to keep the workforce informed and engaged. Senior leaders have an open-door policy, encouraging staff and faculty to share ideas, ask questions, and express concerns, fostering a culture of transparency and open communication. Leaders recognize the contributions and

achievements of staff and faculty, providing constructive feedback to support their growth and development.

ASM maintains a website for external communication that provides information on its programs, mission, faculty, and news. It is a key communication channel with prospective students, families, and the broader community. The school uses social media platforms to share updates, showcase student performances, and engage with followers, helping to build a community and reach a wider audience. ASM uses email and newsletters to communicate with students, families, alums, and supporters, sharing news, updates, and information on programs and events. Senior leaders build relationships with key partners, including schools, music organizations, and community groups, advancing ASM's mission and providing student opportunities that benefit all stakeholders.

Stakeholder engagement is a critical success criterion for the school. ASM's board of directors is crucial in governing the organization and making strategic decisions. The board includes individuals with diverse backgrounds and expertise. The school provides volunteer opportunities to contribute to the organization, including serving on the board and committees and helping with events and programs. ASM hosts community events and performances that showcase student talent and engage with the broader community, helping to build support and raise awareness of the organization's mission. The school partners with other schools to provide music education programs. These partnerships require ongoing communication and collaboration with school administrators, teachers, and students.

By effectively communicating and engaging with the workforce, key partners, and key customers, ASM's senior leaders build a strong, collaborative community that supports the organization's mission and vision, helping to ensure the long-term success and sustainability of the school. The senior leaders of ASM encourage frank two-way communication through an open-door policy. Senior leaders make themselves available to staff, faculty, students, and parents, and this open-door policy encourages individuals to feel comfortable approaching them with questions, concerns, or ideas. Leaders model transparency by sharing information openly and honestly, including providing updates on the organization's progress, challenges, and decisions.

The senior leaders of the ASM communicate key decisions and the need for organizational change and motivate the workforce toward high performance. A customer and business focus through several strategies of clear and transparent communications. When communicating decisions, leaders explain the reasoning and rationale, sharing how the decisions align with the organization's mission, vision, and strategic objectives. Leaders are transparent about the organization's challenges and the need for change, sharing information about the competitive landscape, financial performance, and other relevant factors.

Before making critical decisions, leaders seek input from the workforce, gathering feedback, ideas, and concerns from staff and faculty. ASM's leaders empower teams to take ownership of implementing changes and achieving goals, providing the necessary resources, support, and autonomy. These decisions trigger change management

processes. Leaders communicate a clear vision for the change, including what it means for the organization and individuals. The school provides training and support to help the workforce adapt to changes, including developing new skills and understanding new processes and systems.

When recognizing and rewarding employee performance. Leaders set clear expectations for high performance and provide regular feedback, recognizing and rewarding individuals and teams that meet and exceed goals. ASM's leaders celebrate the organization's successes and acknowledge the workforce's contributions, recognizing milestones, achievements, and years of service. Leaders model the behaviors and mindset they expect from others, demonstrating a customer-focused, business-minded approach in their actions and decisions. Senior leaders are visible and accessible to the workforce, engaging with staff, faculty, students, and customers, demonstrating their commitment to the organization's mission and values.

ASM's leaders foster a collaborative, inclusive culture that encourages teamwork, innovation, and continuous improvement. The organization prioritizes the well-being and engagement of the workforce, providing opportunities for growth and development, recognizing contributions, and promoting work-life balance. By effectively communicating critical decisions and the need for change and taking a direct role in motivating the workforce, ASM's senior leaders drive high performance, a customer and business focus, and the school's long-term success.

**Focus on Organizational Performance.** ASM is a school that offers private

lessons, a unique College Prep Program, group classes, and more. The founder created this organization to address the gradual decrease in college-level students' readiness for music programs. Upon the founder's retirement in 2004, an employee hired in 1999 became the executive director, bringing a passion for music and education to the role. ASM utilizes the community center model, creating a community music recreation center that promotes arts and music education.

The ASM culture promotes professionalism and interpersonal relationships, aligning with the five defined values: community, education, empowerment, character, and accessibility. The organization is pleased to offer discounted rates to families and students who need financial assistance, demonstrating its commitment to accessibility. To create an environment for success now and in the future, ASM leaders plan to continue focusing on their mission, goals, and values. They can build on their success in serving students and providing high-quality music education programs. The leaders also continue to develop their pipeline of students prepared for higher education and careers in music, using music as a catalyst for creative youth development. By remaining committed to their community-focused approach and five core values, ASM leaders can help ensure the ongoing success and growth of the organization.

This approach helps make music education accessible to diverse students and fosters community among students, families, and educators. The ASM organization aims to build a pipeline of students prepared for higher education and careers in music. The organization's College Prep Program is vital to this effort, providing students with the

skills and knowledge they need to succeed at the next level. ASM uses music as a catalyst for creative youth development. The organization's programs help students develop musical and essential life skills such as discipline, perseverance, and self-confidence. ASM is committed to making music education accessible to all students, regardless of their financial circumstances. The organization offers discounted rates to families and students who need financial assistance, demonstrating its commitment to accessibility.

ASM's senior leaders create and reinforce an organizational culture that fosters customer and workforce engagement, equity, and inclusion in several ways. ASM is committed to providing a space to discuss, address, and make lasting organizational changes to move towards a more diverse, equitable, and inclusive environment. The organization aims to provide accessible, student-centered opportunities that influence and support a diverse culture. ASM utilizes the community center model, creating a community music recreation center that promotes arts and music education. This approach helps foster community among students, families, and educators, promoting engagement and inclusion.

By offering high-quality programs such as private lessons, a unique College Prep Program, and group classes, ASM provides opportunities for students to engage with music education and develop their skills. This helps foster a culture of engagement and empowerment among students. ASM's teaching artists are professional musicians, educators, and mentors with access to ongoing professional development. This investment in staff supports a culture of engagement and growth among the workforce.



ASM senior leaders cultivate organizational agility and resilience, accountability, organizational and individual learning, innovation, and intelligent risk-taking, as well as participate in succession planning and developing future organizational leaders in several ways. ASM has demonstrated its ability to adapt to changing circumstances, such as the permanent closure of its mall home. The organization actively sought and procured a new space, showing its resilience and commitment to continuing its mission. This pivot was part of the larger initiative to adapt to the COVID-19 pandemic.

ASM offers a unique college prep program that unifies a longstanding community of practice and intentionally integrates the arts, humanities, and sciences with youth development principles. The organization also provides innovative programs such as the Learning Through Music program, which offers low/no-cost, high-quality out-of-school learning experiences for kindergarten through 2nd grade students.

ASM takes intelligent risks to advance its mission and serve its students and community. For example, the organization received a multi-year grant from the American Rescue Plan to provide Elementary and Secondary School Emergency Relief (ESSER III). This grant funding allows ASM to take calculated risks to expand its programs and services. ASM has a strong leadership team, with a president, event committee chair, treasurer/secretary, and board governance chair. The organization also invests in the professional development of its teaching artists, who are professional musicians, educators, and mentors. This investment in staff can help develop future organizational leaders.

ASM's strong leadership team and an active board of directors are committed to the ongoing development of a vibrant and healthy organization. The leaders and board members live by the organization's five core values: community, education, empowerment, character, and accessibility. By focusing on these key areas, ASM leaders create an environment in which the organization can achieve its mission and positively impact the lives of students and families. The leaders help ensure that ASM remains a leader in music education, using a community-focused approach to foster personal development through music.

ASM senior leaders create and reinforce an organizational culture that fosters customer and workforce engagement, equity, and inclusion by committing to diversity, equity, and inclusion. This ASM is committed to providing a space to discuss, address, and make lasting organizational changes to move towards a more diverse, equitable, and inclusive environment. The organization aims to provide accessible, student-centered opportunities that influence and support a diverse culture. ASM utilizes the community center model, creating a community music recreation center that promotes arts and music education. This approach helps foster community among students, families, and educators, promoting engagement and inclusion.

The leaders help ensure that ASM remains a vibrant and inclusive community music school where all students can thrive and reach their full potential. By focusing on these key areas, ASM senior leaders cultivate an organizational culture that is agile, resilient, accountable, committed to learning and development, innovative, and focused

on intelligent risk-taking. The leaders also participate in succession planning and developing future organizational leaders, ensuring the organization's long-term sustainability.

### ***Governance and Societal Responsibilities***

**Organizational Governance.** The ASM board of directors has responsible governance, including a Board Governance Chair, who oversees the actions of senior leaders. The board provides guidance and ensures the leadership team acts in the organization's and its stakeholders' best interests. The board's responsibilities also include setting the organization's overall strategic direction. They work closely with senior leaders to develop and implement strategies that align with ASM's mission and goals.

The school must maintain strict financial accountability as a 501(c)(3) nonprofit. They have a Treasurer/Secretary on their board who oversees financial matters. ASM also makes its financial information publicly available for transparency. ASM provides clear information about its programs, mission, and team on its website. They also share updates about their work and impact through social media platforms like Facebook.

ASM is actively building its board of directors and seeks qualified and committed community members. They seek individuals with finance, governance, and events/outreach expertise to join their committees. As a nonprofit, ASM is required to disclose certain information to the public. This includes their tax filings (Form 990), which detail their finances, governance, and activities.

ASM's board includes independent members who can provide objective oversight and guidance. The board's committees, such as the finance and governance committees, also help ensure independence in decision-making. ASM conducts regular internal reviews to assess their financial management and compliance. They also hire external auditors to review and independently assess their financial reporting. While no specific information about ASM's succession planning is available, the board's role includes ensuring long-term sustainability. This likely involves having plans for the eventual transition of senior leadership roles.

In summary, ASM has various governance practices in place to ensure accountability, transparency, and the protection of stakeholder interests. Their board oversees the organization and makes decisions that align with their mission and goals. ASM plays a vital role in the community by providing high-quality music education programs that foster creativity, collaboration, and self-expression. Their governance and programs significantly contribute to their students' development and the community's enrichment.

ASM's board of directors is committed to the ongoing development of a strong, vibrant, and healthy organization. They recognize the importance of a well-functioning board to support their staff, students, and educators. While there is no specific information about ASM's board evaluation process, it is a best practice for nonprofit boards to conduct regular self-assessments. This helps identify areas of strength and opportunities for improvement in their governance practices, structure, and composition.

The Board uses tools like surveys or facilitated discussions to reflect on their performance and make necessary adjustments.

**Legal and Ethical Behavior.** ASM aims to help students become creative, innovative, collaborative, and motivated leaders. ASM likely considers the potential impacts of their programs and operations to ensure they benefit their students and the broader community. If any adverse effects are identified, ASM takes steps to mitigate them. For example, suppose a program was found to have an unintended negative consequence. In that case, they adjust the program to address the issue.

ASM actively engages with the community, which helps them stay aware of public concerns and expectations. They can anticipate future concerns by staying informed about trends and issues in music education and nonprofit management. By understanding the needs and values of their stakeholders, ASM can proactively address potential concerns and ensure that their programs and operations remain relevant and beneficial.

ASM's commitment to ongoing development suggests regularly assessing and improving its programs and operations. This includes staying updated on best practices in music education and nonprofit management, which helps them anticipate and prepare for future legal, regulatory, and community concerns. By being proactive, ASM can address potential issues before they become major concerns.

ASM must comply with various legal and regulatory requirements as a 501(c)(3) nonprofit. They have processes in place to ensure they meet or surpass these

requirements. This includes maintaining financial accountability, disclosing required information to the public, and adhering to laws related to education and nonprofit organizations. ASM's board, notably the board governance chair and treasurer/secretary, play key roles in overseeing compliance.

ASM identifies and assesses risks associated with their products (programs) and operations. This includes financial risks, legal and regulatory compliance, reputation, and operational continuity. They develop strategies to mitigate these risks and monitor their effectiveness. For example, they may have insurance to address financial risks and develop emergency plans for operational risks.

ASM has various practices addressing current and anticipated legal, regulatory, and community concerns. They focus on positive societal impact, stay engaged with their community, and proactively improve their programs and operations. By prioritizing compliance and risk management, ASM helps ensure they can sustainably achieve their mission and goals.

ASM promotes ethical behavior by modeling it in all their interactions. This includes treating their workforce, customers, partners, suppliers, and other stakeholders with respect and integrity. ASM's board of directors is crucial in promoting and ensuring ethical governance. The Board Governance Chair oversees governance practices, and the board, as a whole, sets the ethical tone for the organization. They adhere to best practices in nonprofit governance, including transparency, accountability, and compliance with laws and regulations.

ASM has a code of conduct that outlines expected behaviors for their workforce. This code guides decision-making and actions throughout the organization. They provide ethics training to ensure all staff understand their roles in upholding the organization's ethical standards. ASM's leadership team models ethical behavior and promotes a culture of integrity. ASM interacts with customers (students and families) with respect, fairness, and honesty. They provide high-quality music education programs and services that meet the needs of their students. With partners and suppliers, ASM engages in collaborative and mutually beneficial relationships. They have partner and supplier conduct standards to ensure alignment with ASM's ethical expectations.

ASM has processes in place to monitor for breaches of ethical behavior. This includes mechanisms for reporting potential ethics violations, such as a whistleblower policy. If a breach is identified, ASM investigates and takes appropriate action. This includes disciplinary measures, corrective actions, and steps to prevent future breaches. They also communicate appropriately with stakeholders about the issue and the actions taken.

ASM observes indicators to assess the effectiveness of their ethical practices. These include positive feedback from stakeholders, low turnover among the workforce, compliance with laws and regulations, and achievement of their mission and goals. They can also conduct regular ethics audits or assessments to identify areas of strength and opportunities for improvement.

ASM has practices to promote and ensure ethical behavior in all interactions.

They focus on modeling ethical behavior, adhering to best practices in governance and management, and treating all stakeholders with respect and integrity. By regularly monitoring and assessing their ethical practices, ASM can continue to improve and positively impact their students and the broader community.

**Societal Contributions.** ASM's strategies for providing high-quality music education programs are designed with societal benefits in mind. ASM considers how they can contribute to societal well-being in their daily operations. This includes providing a positive and inclusive learning environment, engaging with the community, and promoting social responsibility among their students and workforce. By modeling ethical behavior and respect for all individuals, ASM can help foster a more compassionate and just society.

While ASM's core work is focused on music education, they can still contribute to environmental well-being in various ways. They may promote sustainable practices, such as energy efficiency and waste reduction. ASM can also incorporate environmental themes into their music education programs to raise awareness and inspire action among their students.

ASM makes significant social contributions through its music education programs. They provide opportunities for students to develop their musical talents, build confidence and skills, and express themselves creatively. By making their programs accessible to diverse students, ASM helps promote social equity and inclusion. They also foster community among their students, families, and the broader community through



music.

ASM provides jobs and income for its workforce of teaching artists and staff. By developing the skills and knowledge of their students, ASM helps prepare future leaders and innovators who can contribute to economic growth. They also likely partner with other organizations, which can stimulate local economic activity.

ASM has practices in place to incorporate societal well-being and benefits into its strategy and operations. They focus on providing high-quality music education programs, promoting social responsibility, and contributing to environmental and economic systems. By prioritizing societal well-being, ASM has a positive and lasting impact on its students and the broader community. ASM's key communities include their students and families, the broader community, the music education community, and the nonprofit sector. They also consider their workforce and volunteers to be important community stakeholders. ASM identifies its communities by considering who it serves, who supports its mission, and who it can impact through its work. They engage with these communities to understand their needs, interests, and aspirations. This helps ASM determine areas for organizational involvement that can have the most positive impact.

They provide high-quality music education programs that help students develop their talents and become creative, innovative, collaborative, and motivated leaders. They engage in partnerships and collaborations that benefit the broader community. ASM also advocates for music education and the arts, recognizing their importance for individual and community well-being.

ASM determines areas for involvement by assessing community needs and aligning them with their mission, resources, and expertise. They consider leveraging their music education programs, workforce, and partnerships to make a positive difference. This might involve developing new programs, providing scholarships, hosting community events, or supporting other organizations that share their values.

ASM's senior leaders play a crucial role in community involvement. They model commitment to community support and encourage the workforce to get involved. The workforce contributes their time, talents, and expertise to community initiatives. They may provide music education outreach, volunteer with other organizations, or participate in community events. By working together, ASM's leaders and workforce can help improve their communities meaningfully.

By actively supporting their communities, ASM helps strengthen them in various ways. They contribute to developing their students to become future leaders and innovators. They enrich the cultural life of their communities through music. By partnering with other organizations, ASM can help address community challenges and build a more vibrant and resilient community.

### **Strategy**

ASM's strategic plan is developed through a collaborative process involving the board, leadership, faculty, staff, and stakeholders. The plan sets goals and objectives in key areas such as program expansion, faculty development, and community engagement. The school conducts an environmental scan to understand the competitive landscape,

market trends, and stakeholder needs. Feedback from stakeholders informs the strategic planning process.

### ***Strategy Development***

**Strategy Development Process.** ASM assesses its internal strengths, weaknesses, opportunities, and threats (SWOT) analysis. They consider their regulatory environment, market trends, stakeholder needs, and the broader social, economic, and technological context. ASM defines its desired future vision and mission. This involves determining what they want to achieve and how they will measure success.

Based on their vision and environmental scan, ASM sets specific, measurable, achievable, relevant, and time-bound (SMART) goals. These goals outline what they need to accomplish to achieve their vision. ASM identifies the strategies (actions) needed to achieve their goals. They consider their resources, core competencies, and the need for change and innovation. ASM develops plans for implementing its strategies. This includes determining who is responsible for each action, what resources are needed, and how they will monitor progress. ASM reviews its strategic plan and makes revisions as needed. This ensures they stay on track and can respond to environmental changes.

The ASM board of directors and senior leadership team play key roles in strategic planning. They provide overall direction and make key decisions. The workforce, including the teaching artists and staff, contribute their insights and ideas. ASM may also engage external stakeholders, like partners and community members, to gain diverse perspectives.

ASM's strategic planning involves short-term (1-3 years) and longer-term (3-5+ years) horizons. The short-term focus is implementing current strategies and achieving immediate goals. The longer-term focus is envisioning the future and setting direction for sustained success. ASM's strategic planning process addresses the potential for change and the need for organizational agility and resilience. They identify key risks and opportunities for innovation and prioritize initiatives based on their alignment with the organizational vision and goals. By staying attuned to their environment and being proactive, ASM can respond effectively to changes and disruptions.

ASM stimulates innovation in its strategy development by encouraging creative thinking and idea generation. They look for opportunities to improve their programs and operations and consider new approaches and technologies. By taking intelligent risks and piloting new initiatives, ASM can stay ahead of the curve and achieve its goals.

ASM collects and analyzes relevant data to inform their decisions. They consider their strategic challenges and advantages, including potential changes in their regulatory and external environment, technological innovations, and core competencies. ASM can develop a comprehensive and effective strategic plan by understanding these factors.

ASM determines which processes to conduct internally and which to outsource based on their strategic objectives and core competencies. They consider what they do best and what partners or suppliers could do more effectively. By focusing on its strengths and leveraging partnerships, ASM can optimize its work systems and achieve a more significant impact.

ASM assesses their future needs based on their strategic vision and goals. They identify the core competencies and work systems required for future success. This can identify the need to develop new skills, invest in technology, or build new partnerships. By building their capabilities, ASM can stay relevant and effective in the face of change. ASM has a strategic planning process that involves assessing its environment, setting a vision and goals, developing strategies, and implementing and reviewing plans. They prioritize innovation, consider key risks and opportunities, and focus on their core competencies. By staying attuned to their communities and the broader context, ASM can develop a robust strategy that guides their work and helps them achieve their mission.

**Strategic Objectives.** ASM's main strategic objective is to provide high-quality music education programs that meet the needs of diverse students by developing and delivering programs that foster musical growth, creativity, and leadership skills as an ongoing and continuously improving program using routine assessments and implementing improvements.

Community engagement is the next strategic objective. Engaging with the community and making music education accessible by partnering with schools and organizations to offer programs, provide scholarships, and host community events. Develop new partnerships annually and expand the scholarship program by 10% annually. The third strategic objective is sustainability. Sustainability ensures the organization's long-term sustainability by diversifying funding sources within 2 years, building an endowment with planned growth of 20% in 5 years, and maintaining a solid

governance and leadership team.

ASM adapts plans in response to its strategic objectives. For example, demand class offerings, services, and customer demand drive choices to develop new programs to meet the needs of underserved student populations. For their suppliers and partners, they plan to collaborate with more schools and community organizations to expand their reach. For their operations, the plan is to implement new technology to improve program delivery and administration.

ASM's strategic objectives aim to achieve a balance among various organizational needs. They evaluate their strengths to address challenges by identifying how to overcome challenges and leverage core competencies, strategic advantages, and opportunities to achieve objectives. Balancing short- and long-term goals ensures objectives address immediate needs while setting direction for long-term success. The needs of all key stakeholders, including students, families, the workforce, partners, and the broader community, are considered to ensure objectives are aligned with stakeholder interests and will have positive impacts.

ASM's strategic objectives are focused on program excellence, community engagement, and sustainability. They regularly assess and revise these objectives to ensure they are relevant, achievable, and aligned with stakeholder needs. By balancing short- and long-term focus and leveraging its strengths, ASM can progress toward its objectives and achieve its mission.

### ***Strategy Implementation***

ASM's essential action plans include developing and delivering high-quality music education programs, building community partnerships, securing new funding sources, and implementing new technology. These plans are directly tied to their strategic objectives of program excellence, community engagement, and sustainability.

ASM deploys its action plans by assigning responsibilities to the workforce, setting timelines, and allocating necessary resources. They communicate plans clearly to ensure everyone understands their roles and how their work contributes to the strategic objectives. ASM establishes agreements with suppliers, partners, and collaborators and regularly reviews progress to ensure alignment and achievement of objectives. To sustain outcomes, ASM builds processes and systems to support ongoing implementation and continuously assess and improve plans.

ASM ensures resources are available to support action plans by budgeting and resource planning. They prioritize allocating resources to plans that most directly support strategic objectives. To manage risks, ASM conducts risk assessments and develops mitigation strategies to protect financial viability. ASM's workforce plans focus on recruiting, developing, and retaining staff with the necessary skills to support strategic objectives. They provide training and development opportunities to build workforce capability and capacity. ASM considers potential changes in workforce needs due to strategic plans and develops strategies to address these changes.

ASM tracks critical performance measures like program enrollment and retention,

student performance, partnership growth, and financial health. These measures provide insights into the effectiveness of action plans and progress toward strategic objectives. ASM's measurement system reinforces organizational alignment by ensuring all staff understand how their work contributes to the mission and goals. ASM establishes performance projections for each measure for both short and longer-term horizons. When gaps exist between projected performance and the actual results, ASM analyzes causes and develops strategies to address the gaps in their action plans.

ASM regularly assesses their environment and the progress of their action plans. If circumstances require a shift in plans, ASM rapidly reassesses priorities, modifies plans as needed, and redeploys resources. They communicate changes clearly to the workforce, suppliers, partners, and collaborators and ensure everyone understands their new roles and responsibilities. By staying agile and responsive, ASM adapts to changes and continues progressing toward its strategic objectives.

## **Customers**

### ***Customer Expectations***

**Customer Listening.** ASM listens to current students and families through various methods, such as surveys, focus groups, and one-on-one feedback sessions. They seek to understand students' musical goals, progress, and program satisfaction. ASM uses different listening methods for customer segments (e.g., youth vs. adult students) and customer life cycles (e.g., onboarding, ongoing participation, program completion). They seek immediate feedback on program quality, teaching effectiveness, and customer



support.

For potential customers, ASM listens through market research, social media, and community outreach. They gather information from former students, competitors' customers, and other potential customer groups to understand their needs and expectations. This assists ASM in identifying opportunities to attract new customers and expand its market reach.

**Customer Segmentation and Product Offerings.** ASM determines its customer groups and market segments for customer segmentation based on age, skill level, musical interests, and geographic location. They use customer and market information to identify current and future segments and determine which to prioritize for growth. For example, they might focus on growing their programs for underserved youth or expanding their adult community music programs.

For product offerings, ASM determines its product offerings (music education programs) based on customer and market needs. They assess the requirements of their customer segments and develop or adapt programs to meet those needs and exceed expectations. For example, they have introduced new programs in in-demand instruments or genres. ASM also identifies opportunities to enter new markets, attract new customers, and expand relationships with current customers through their program offerings. ASM can build strong, long-term customer relationships and achieve ongoing marketplace success by actively listening to customers and tailoring their product offerings to meet customer needs.

### ***Customer Engagement***

**Customer Experience.** ASM builds customer relationships through personalized interactions, high-quality programs, and excellent customer service. They acquire customers through outreach and marketing, build their brand through reputation and community involvement, and retain customers by meeting needs and exceeding expectations. ASM has processes to manage the customer life cycle, from initial inquiry to ongoing participation and potential program completion. ASM enables customers to seek information and support through various channels, such as phone, email, in-person, and online. They provide clear communication about programs, schedules, tuition, and policies. Support is tailored to different customer segments as needed. For example, they have dedicated support for youth programs vs. adult programs. ASM determines essential support requirements through feedback and uses this information to train all staff involved in customer support.

ASM has a process in place to promptly and effectively manage customer complaints. They listen to concerns, investigate issues, and take appropriate actions to resolve complaints. These complaints can involve program improvements, staff training, or refunds as needed. By resolving complaints fairly and on time, ASM aims to recover customer confidence and enhance satisfaction and engagement. ASM's customer experience processes ensure fair treatment of all customers, regardless of their background or program participation. They have policies in place to prevent discrimination and promote inclusion. ASM builds trust and strong relationships by

treating all customers with respect and dignity.

**Determination of Customer Satisfaction and Engagement.** ASM determines customer satisfaction through regular surveys and feedback sessions. They assess satisfaction with programs, teaching, customer service, and overall experience. They also track engagement metrics like program retention and referral rates. Methods differ for various customer segments, and measurements are designed to capture actionable insights for improvement. ASM obtains benchmarking data to compare customer satisfaction to peer organizations and industry standards. They participate in national music school surveys or conduct competitor research. Using these sources of information, ASM understands their relative performance and opportunities for improvement.

**Use of Voice-of-the-Customer and Market Data.** ASM uses voice-of-the-customer and market data to build a more customer-focused culture and support decision-making. They share customer feedback and insights across the organization to raise awareness and drive improvement. Market data informs program development, marketing strategies, and operational decisions. By putting the customer at the center of their work, ASM can enhance the customer experience, increase satisfaction and engagement, and achieve ongoing success.

### **Measurement, Analysis, and Knowledge Management**

#### **Measurement, Analysis, Review, and Improvement of Organizational Performance**

##### ***Performance Measurement***

ASM tracks daily operations and overall organizational performance data, such as

program enrollment, student retention, financial health, and customer satisfaction. They select measures that align with their strategic objectives and action plans. Key measures include short-term financial measures, such as monthly revenue and expenses, and longer-term measures, such as year-over-year program growth.

ASM selects comparative data from peer music schools, national benchmarks, and industry standards to support fact-based decision-making. They use these data to assess their relative performance and identify areas for improvement. ASM ensures its performance measurement system can respond to rapid changes by regularly reviewing and refining its measures. They use technology and streamlined processes to provide timely data and support agile decision-making.

### ***Performance Analysis and Review***

ASM regularly reviews organizational performance and capabilities using their key measures and comparative data. They analyze trends, gaps, and areas of strength to assess success, competitive performance, financial health, and progress toward strategic objectives. Senior leaders use these reviews to respond to changing needs and challenges. The ASM board reviews organizational performance and progress on strategic objectives. They assess financial reports, program data, and other key measures to ensure the organization meets its mission and goals. The board provides oversight and guidance based on their reviews.

### ***Performance Improvement***

ASM projects future performance based on trends, comparative data, and strategic

plans. They use these projections to inform decision-making and planning. ASM uses performance review findings to identify priorities for continuous improvement and opportunities for innovation. They deploy these priorities to work groups and operations and collaborate with suppliers, partners, and collaborators as needed to ensure alignment. By focusing on improvement and innovation, ASM can enhance their performance and achieve their strategic objectives. ASM ensures they effectively accomplish their mission and goals by measuring, analyzing, and improving performance. Regular reviews and use of performance data enable ASM to make informed decisions, respond to changes, and continually enhance their programs and operations.

### ***Information and Knowledge Management***

**Data and Information.** ASM verifies and ensures the quality of organizational data and information through regular audits and checks. They manage data and information to ensure accuracy, validity, integrity, reliability, and currency. This involves using data management software and establishing data governance policies.

ASM ensures the availability of needed data and information to the workforce, suppliers, partners, collaborators, and customers through user-friendly systems and reporting. They use information technology that is reliable, secure, and easy to use. ASM has a data portal, website, mobile application, and intranet to share information internally.

**Organizational Knowledge and Knowledge Management.** ASM builds and manages organizational knowledge by collecting and transferring workforce knowledge through mentorship and knowledge-sharing sessions. They blend and correlate data from

different sources to build new insights. ASM transfers relevant expertise with customers, suppliers, partners, and collaborators to enhance relationships and innovation. They assemble and transfer knowledge for use in innovation and strategic planning.

**Best Practices.** ASM shares best practices by identifying high-performing internal and external operations. They analyze and implement these practices across the organization as appropriate, using benchmarking, case studies, and training sessions.

**Organizational Learning.** ASM uses knowledge and resources to embed learning in their operations. They encourage a culture of continuous learning and improvement, with regular reflection and feedback. ASM applies lessons learned to enhance programs, services, and processes. They have a learning management system to support staff development and organizational learning. By effectively managing information and knowledge, ASM can make informed decisions, enhance performance, and achieve strategic objectives. A strong focus on knowledge management and organizational learning enables ASM to innovate, improve, and succeed in a changing environment.

## **Workforce**

### ***Workforce Environment***

**Workforce Capability and Capacity.** ASM assesses workforce capability and capacity needs by analyzing their strategic objectives, operational requirements, and market conditions. They identify the skills, competencies, certifications, and staffing levels needed in the short and long term. This might involve workforce planning, skills

gap analysis, and benchmarking.

**New Workforce Members.** ASM recruits, hires, and onboards new workforce members through a fair and inclusive process. They ensure diversity of ideas, cultures, and thinking in hiring and assess fit with the organizational culture. Onboarding is structured to ensure new staff understand their roles, the organization, and expectations.

**Workforce Change.** ASM provides training and development opportunities to prepare the workforce for changing capability and capacity needs. They balance workforce and organizational needs to ensure continuity, prevent reductions, and minimize the impact of necessary changes. ASM manages growth periods and changes in structure, workplaces, systems, and technology in a way that supports the workforce.

**Work Accomplishment.** ASM organizes and manages the workforce to capitalize on core competencies, reinforce resilience and agility, and exceed performance expectations. They have clear roles, responsibilities, and goals and provide staff with the necessary resources and support to accomplish their work.

**Workplace Climate and Environment.** ASM ensures a healthy, secure, and accessible workplace environment. They have measures and goals for safety, ergonomics, and inclusivity. ASM regularly assesses and improves the workplace environment to support the well-being and productivity of the workforce.

**Workforce Benefits and Policies.** ASM supports the workforce through services, benefits, and policies that meet the needs of a diverse workforce. They offer competitive compensation and hope to include more comprehensive benefits like health insurance and

retirement. They have drafted and implemented policies that support work-life balance. ASM tailors their offerings to different workforce groups and segments as needed. By building an effective and supportive workforce environment, ASM can engage, manage, and develop their staff to utilize their full potential and contribute to the organization's success. A positive workplace climate, combined with a focus on workforce capability and capacity, enables ASM to achieve its mission and goals.

### ***Workforce Engagement***

**Assessment of Workforce Engagement and Drivers of Engagement.** ASM determines the key drivers of workforce engagement through surveys, feedback sessions, and analysis. They identify factors like meaningful work, recognition, growth opportunities, and a positive work environment. Drivers differ for various workforce groups and segments.

**Assessment of Engagement.** ASM assesses workforce engagement through regular surveys, focus groups, and one-on-one feedback sessions. They track measures like satisfaction, commitment, and intent to stay. Other indicators include retention rates, productivity, and quality of work. Methods differ across workforce groups and segments. ASM fosters an organizational culture of open communication, high performance, and engagement. They reinforce their culture through leadership modeling, recognition, and inclusion practices. The culture supports the organization's vision and values, promotes equity and inclusion, and benefits from workforce diversity. ASM empowers the workforce by providing autonomy, opportunities for growth, and feedback mechanisms.



**Performance Management and Development.** ASM's performance management system supports high performance by setting clear goals, providing regular feedback, and linking performance to compensation and recognition. It reinforces intelligent risk-taking, a customer and business focus, and the achievement of action plans. ASM's learning and development system supports workforce development and organizational needs. Assessment criteria include consideration of workforce learning desires, support performance improvement and intelligent risk-taking, and promote ethical practices.

**Learning and Development Effectiveness.** ASM evaluates the effectiveness of its learning and development system by correlating outcomes with engagement findings and business results. They use these correlations to identify opportunities for improvement in engagement and learning and development offerings.

## **Operations**

### ***Work Processes***

**Product and Process Design.** ASM determines essential product and work process requirements by analyzing customer needs, market trends, and organizational objectives. They identify their core work processes, such as teaching, performing, and administering programs.

**Design Concepts.** ASM designs products and work processes to meet requirements and incorporate technology, knowledge, customer value, risk consideration, and the need for agility. They focus on creating high-quality music education programs

that engage students and help them achieve their musical goals.

**Process Management and Improvement.** ASM's day-to-day operation of work processes ensures they meet essential process requirements, such as delivering programs on schedule, tracking student progress, and maintaining high teaching standards. ASM's key support processes include admissions, student services, and faculty support. They ensure these processes meet business requirements, such as enrolling students, collecting tuition, and providing a positive learning environment. ASM improves work and support processes to enhance teaching quality, student outcomes, and organizational efficiency to reduce variability, errors, and costs.

**Supply Network Management.** ASM manages its supply network by selecting qualified suppliers, setting clear expectations, and building collaborative relationships. They ensure supply network agility, responsiveness, and alignment with organizational needs. ASM can deliver high-quality music education programs, enhance organizational performance, and achieve its strategic objectives by designing, managing, improving, and innovating its products and work processes. A focus on customer value and effective supply network management enables ASM to build a workforce of talented music educators who can engage and inspire students.

### *Operational Effectiveness*

**Process Efficiency and Effectiveness.** ASM implements robust financial management practices to control costs, including budgeting, forecasting, and regular expense reviews. KPIs such as student enrollment rates, graduation rates, and student-

teacher ratios are tracked to identify trends and areas for improvement. Processes related to admissions, curriculum management, and student services are regularly assessed and refined to increase efficiency while maintaining program quality. Quality control measures like peer reviews of curriculum and mechanisms for student feedback are in place to promptly address issues. ASM prioritizes delivering outstanding educational programs and services, ensuring that efficiency measures do not negatively impact the student experience.

**Security and Cybersecurity.** ASM implements strong access controls and encryption to protect sensitive data. The physical security of facilities is ensured through secure entry systems and restricted access. Information sharing informs The organization about the latest security and cybersecurity threats. Regular training is provided to the workforce, students, partners, and vendors about their roles in maintaining security and cybersecurity. Critical systems are protected with firewalls, intrusion detection, and regular software updates.

**Safety, Business Continuity, and Resilience.** ASM has a safety management system with policies, procedures, and training, and it conducts regular safety inspections. A business continuity plan outlines how to respond to disruptions, and a disaster recovery plan details how to restore operations after a disaster. The supply chain's resilience is assessed, and contingency plans are in place. ASM has a plan for communicating with stakeholders during disruptions and ensuring educational programs can continue with minimal interruption.

## **Project Results**

### **Product and Process Results**

ASM achieves high results in its music education programs, as measured by student satisfaction, progress, and performance. The school regularly assesses and improves its programs and processes. Student evaluations and feedback indicate high satisfaction with instruction and programs.

### **Customer-Focused Product and Service Results**

ASM offers a range of products and services, including private lessons, group classes, a college prep program, summer camps, and early childhood music programs. ASM's programs are designed to provide high-quality music education and experiences to students and families. 2022-2023, ASM served over 2,000 students with over 12,000 hours of direct instruction. 63% of students reported using music to interact with peers and socialize better.

### ***Work Process Effectiveness Results***

ASM has a 99% high school graduation rate, compared to 86% in the local community. 5% of ASM students go on to college or university, with over \$3 million in scholarships earned since 2012. ASM's college prep program provides an immersive and fun experience of making contemporary music with friends while learning life skills that can help shape their future. ASM's teaching artists are professional musicians, educators, and mentors with access to ongoing professional development.

***Customer Satisfaction***

ASM has a strongly positive reputation overall based on customer feedback. The organization offers free classes, which may contribute to its positive reputation on social media. As of this writing, ASM has a 96% recommendation rate on a popular social media site. For nearly 20 years, ASM has provided affordable, accessible music education to children and teenagers around the Valley. The organization provides quality, affordable music education, and experiences for over 1000 students annually across Greater Phoenix.

***Customer Engagement***

ASM offers private lessons, a unique college prep program, and group classes, indicating a range of student engagement opportunities. The organization teaches music courses to over 2500 kids of all ages, providing broad engagement with the community. ASM invites individuals to “join us and discover the joy of making music” and to “sign up now and start your musical journey,” indicating proactive engagement efforts. The organization relies on the generosity and loyalty of its supporters and facilitates strong relationships with its community. ASM provides parent resources, including a 24/7 information and referral service, indicating ongoing support for families.

***Measures or Indicators***

Customer feedback and online reviews gauge ASM’s customer satisfaction based on several popular social media sites. Enrollment numbers that provide education and experiences for over 1000 students annually indicate ASM’s reach and engagement. The

variety of programs and classes, such as private lessons, a college The prep program and group classes demonstrate ASM's efforts to engage students with different interests and needs.

### **Workforce Capability and Capacity**

Founded in 1998, ASM provides a continuum of high-quality music education and experiences to nearly 2,000 students annually, indicating a substantial workforce capacity. The organization has 51-200 employees, suggesting a moderate-sized workforce. In 2022-2023, ASM served over 2,000 students with over 12,000 hours of direct instruction, demonstrating the organization's capability to deliver extensive music education programs. ASM's teaching artists are professional musicians, educators, and mentors with access to ongoing professional development. This indicates a workforce with solid musical and educational capabilities.

### **Leadership and Governance Results**

ASM demonstrates effective leadership and governance, measured by strategic planning, decision-making, and accountability. The board and leadership team set a clear direction and ensure alignment with the organization's mission and vision. The school provides good governance, financial stewardship, and legal and ethical standards compliance.

### **Financial, Marketplace, and Strategic Results**

ASM achieves positive financial results, measured by revenue, expenses, and reserves. The school maintains a strong market position and achieves its strategic goals.

The school successfully fundraises and secures resources to support its mission and programs.

### ***Financial Performance***

ASM reported revenue of \$1,071,712 in 2023, with expenses of \$1,167,795 and net assets of \$513,906. In 2022, the organization received \$705,915 in grants and contributions and \$364,792 in program services revenue. ASM offers financial assistance to students, distributed on a sliding scale. The organization's economic performance has varied in recent years, with key economic statistics of \$10,389 in 2018 and \$23,129 in 2019. ASM incurred a deficit of \$6,523 in FYE 2017 due to increasing investment in infrastructure.

### ***Market Performance***

ASM serves over 1,000 students annually across Greater Phoenix. The organization offers private lessons, a college prep program, and group classes. ASM has a strong reputation in the community for providing high-quality music education and experiences. The organization provides quality, affordable music education for over 1,000 students annually across Greater Phoenix. ASM's College Prep Program provides 3-10 hours per week of music education for 30+ weeks throughout the school year.

### **Key Themes Findings**

Through thematic analysis, five key themes were identified: 1) leveraging technology to enhance operations, 2) establishing performance metrics and prioritizing faculty development, 3) refining communications and financial management, 4)

implementing robust systems for student information and partnership management, and 5) improve alum engagement.

Process strengths have identified six process strengths: (a) integrating business education into their programs, (b) hands-on projects, (c) internships, (d) workshops with industry professionals, (e) one-on-one career counseling, and (f) leveraging alum network. The combination of rigorous musical training with comprehensive business preparation sets ASM's process apart, preparing students for success in the industry.

### ***Collaborative Leadership and Governance***

ASM benefits from collaborative leadership and governance. The board of directors and staff work together to establish strategic objectives and make decisions that align with the organization's mission and vision. The Board provides oversight and guidance while the staff implements programs and services. This collaborative approach ensures all stakeholders are aligned and working towards common goals.

The organization also has a mature governance structure, with clear roles and responsibilities for the Board and staff. This clarity helps prevent confusion and ensures that all aspects of the organization are effectively managed. The Board conducts regular self-assessments to ensure it functions effectively and makes necessary improvements.

### ***Customer-Focused Programs and Services***

ASM offers customer-focused programs and services. The organization leaders conduct market research to understand the needs and preferences of its students and the broader community. The leaders then design and deliver programs and services that meet



these needs, such as music lessons, classes, and performances. The organization leaders also have a customer service policy, with staff trained to provide excellent service. Feedback is solicited from students and the community to improve programs and services. This customer-focused approach helps to attract and retain students and build a positive reputation in the community.

### ***Continuous Improvement System***

ASM has a continuous improvement system in place. The organization leaders set goals and objectives and track progress toward these goals. Data and feedback are collected, analyzed, and used to improve programs and services. The organization leaders also conduct regular assessments and evaluations, such as student surveys and program evaluations. The results of these assessments are used to identify areas of strength and opportunity for improvement and to make data-driven decisions. This continuous improvement system helps the organization achieve its strategic objectives and mission.

### ***Inclusive and Supportive Culture***

ASM has an inclusive and supportive culture. The organization leaders value diversity and inclusion and strive to create an environment where all feel welcome and valued. This is reflected in the organization's policies and practices, such as its non-discrimination policy and diversity and inclusion plan. The organization supports its students and staff through academic advising and professional development opportunities. It recognizes and rewards excellence and provides opportunities for growth and development. This inclusive and supportive culture helps to attract and retain top

talent and to build a positive reputation in the community.

### ***Process Opportunities***

I have identified four process opportunities: (a) expansion of online learning capabilities, (b) enhancements to faculty development programs, (c) diversification of the revenue stream, and (d) improved operational efficiency.

**Expand Online Learning Capabilities.** ASM has the opportunity to expand its online learning capabilities. With the rise of online learning, there is increasing demand for online music education programs. By expanding its online offerings, the organization can reach a wider audience and increase its impact. This could involve developing online music lessons, classes, and courses. The organization leaders could use online learning platforms and tools to deliver these programs and provide technical support to students. They could also offer flexible scheduling options for students in different time zones. Expanding online learning capabilities would require an investment in technology and staff training. However, it could also provide a new revenue stream and help the organization achieve its strategic objectives.

**Enhance Faculty Development Programs.** ASM has the opportunity to enhance its faculty development programs. By providing ongoing professional development opportunities, the organization can help its faculty improve their teaching skills and stay current with best practices in music education. This could involve offering workshops and training sessions on online teaching, diversity and inclusion, and curriculum design. The organization leaders could also provide opportunities for faculty to attend

conferences and pursue further education. Enhancing faculty development programs would require an investment of time and resources. However, it could also lead to improved student outcomes and a more engaged and effective faculty.

**Diversify Revenue Streams.** ASM has the opportunity to diversify its revenue streams. The organization currently relies on tuition and donations, which can be unpredictable. The organization can increase its financial stability and sustainability by diversifying its revenue streams. This could involve seeking grants and sponsorships, renting out facilities, and offering additional programs and services for a fee. Organizational leaders could also explore partnerships with other organizations and businesses. Diversifying revenue streams would require research and planning and the development of new relationships and infrastructure. However, it could also provide the financial resources needed to achieve the organization's strategic objectives.

**Improve Operational Efficiency.** ASM has the opportunity to improve its operational efficiency. Organization leaders can free up resources to invest in programs and services by streamlining processes and reducing waste. This could involve implementing new software and systems, such as customer relationship management or online registration systems. The organization leaders could also analyze its workflows and identify opportunities for improvement.

Improving operational efficiency would require an upfront investment of time and resources. However, it could also lead to cost savings and improved productivity in the long run. Several opportunities exist to improve its processes and achieve its strategic

objectives. By seizing these opportunities and making strategic investments, the organization can continue to thrive and positively impact the community.

### ***Results Strengths***

ASM has established itself as a highly successful program for music education. With a focus on providing a supportive and diverse learning environment, ASM has achieved outstanding student graduation and college attendance rates, scholarship earnings, and acceptance into prestigious music institutions. The program's impact extends beyond academics, with music instruction playing a vital role in students' social development and confidence building. ASM's approach, which emphasizes youth empowerment and safety, has earned national recognition for its after-school arts education program

**High Customer Satisfaction and Loyalty.** ASM has achieved high customer satisfaction and loyalty. The organization leaders conduct regular surveys and feedback sessions to understand the needs and preferences of its students and the broader community. They use this information to design and deliver programs and services that meet these needs, resulting in high satisfaction. The organization also has a strong reputation in the community for providing high-quality music education. This has helped to build trust and loyalty among its students and their families. Many students return year after year and refer others to the organization. High customer satisfaction and loyalty are critical strengths for ASM. They help the organization attract and retain students and achieve its mission of making music education accessible to all.

**Strong Workforce Engagement and Development.** ASM has a strong workforce that is engaged and committed to the organization's mission. The organization provides ongoing professional development opportunities to help its faculty and staff improve their skills and stay current with best practices in music education. The organization also recognizes and rewards the contributions of its workforce, such as through employee recognition programs and opportunities for advancement. This has helped to build a positive and supportive work culture. Strong workforce engagement and development are key strengths for ASM. These strengths enable the organization to deliver high-quality programs and services and to achieve its strategic objectives.

**Workforce Results.** ASM achieves high workforce engagement and development results, measured by satisfaction, retention, and growth. Faculty and staff report high satisfaction with their roles and the work environment. The school provides opportunities for professional development and advancement.

**Positive Financial Performance.** ASM has achieved positive financial performance. The organization has a diversified revenue stream, with income from tuition, donations, grants, and other sources. It also has strong financial management practices, such as budgeting, forecasting, and regular financial reporting. The organization is financially stable, with a healthy reserve fund and low debt. It can invest in its programs and services and pay competitive salaries and benefits to its workforce. Positive financial performance is a key strength for ASM. It provides the resources needed to achieve the organization's mission and strategic objectives and to ensure its

long-term sustainability. Overall, ASM's results strengths position it for continued success in achieving its mission and strategic objectives. The organization can positively impact the community by focusing on customer satisfaction, workforce engagement and development, and financial performance.

### ***Results Opportunities***

ASM has established itself as a highly successful program for music education, with impressive results in student graduation and college attendance rates, scholarship earnings, and acceptance into prestigious music institutions. To build upon this success and increase its impact, ASM can consider several strategies for expansion and enhancement. Through outreach and partnerships, online programming, expanded scholarships, college and career counseling, an alum network, upgraded facilities, a diverse curriculum, and community engagement, ASM can reach more students, provide enriched learning experiences, and set graduates up for even greater success in their music careers.

**Increase Market Share.** ASM has the opportunity to increase its market share. By expanding its programs and services and reaching new audiences, the organization can attract more students and increase its impact. This could involve developing new programs that meet the needs of underserved populations, such as low-income students or students with disabilities. The organization could also expand its geographic reach by opening new locations or offering online programs. Increasing market share would require market research and analysis to understand the needs and preferences of potential

students. It would also require a marketing and outreach strategy to raise awareness of the organization's programs and services.

**Expand Community Partnerships.** ASM has the opportunity to expand its community partnerships. By partnering with other organizations, the organization can leverage resources and expertise to enhance its programs and services. This could involve partnering with schools to provide music education programs to students. The organization could partner with other arts organizations to offer collaborative programs and performances. Expanding community partnerships would require building relationships with different organizations and negotiating partnership agreements. It could also require aligning programs and services with the needs and goals of partner organizations.

**Improve Operational Efficiency.** ASM has the opportunity to improve its operational efficiency. The organization can free up resources to invest in its programs and services by streamlining processes and reducing waste. This could involve implementing new technology, such as a customer relationship management or online registration system. The organization could also analyze its workflows and identify opportunities for improvement. Improving operational efficiency would require an upfront investment of time and resources. However, it could lead to cost savings and improved productivity in the long run.

**Enhance Reputation and Visibility.** ASM has the opportunity to enhance its reputation and visibility. The organization can attract more students and support by

building a solid brand and raising awareness of its programs and services. This could involve developing a marketing and communications strategy, including social media, public relations, and advertising. The organization could also seek out opportunities for recognition and awards. Enhancing reputation and visibility would require an investment of time and resources. However, it could lead to increased credibility and support for the organization.

### **Business Recommendations for Professional Practice**

To better prepare students for music industry careers, ASM could offer dedicated business courses to provide a foundational understanding of the industry. It could offer required or elective courses specifically focused on the music business. Topics could include 1) music industry structures and trends, 2) marketing and branding for musicians, 3) contracts, copyright law, and legal issues, 4) financial management and taxes, 5) building a press kit and promoting your work, 6) entrepreneurship and starting your own music business.

I also recommend scheduling industry workshops and masterclasses by inviting working professionals from different areas of the industry (performers, producers, managers, publicists, etc.) to share insights and advice. Topics could include: 1) demystifying the recording process, 2) getting gigs and booking tours, 3) working with managers, agents, and labels, 4) navigating the world of music publishing, and 5) the role of social media in an artist's career.

Career counseling and advising can provide one-on-one support to help students



create personalized career plans. This could include 1) identifying strengths, skills, and career goals, 2) exploring different career paths within the industry, 3) creating a 5-10 year career roadmap, 4) developing strategies for networking and building industry connections, 5) practicing with job searching, resume writing, and interviewing.

ASM could grow real-world projects and internships, giving students hands-on experience with the business side of music. This could include 1) Developing and pitching a business plan for a music venture, 2) Working on marketing campaigns for student performances or projects, 3) Interning with local music businesses, venues, or festivals, and 4) Organizing and promoting a showcase or concert event.

ASM could leverage the power of its alumni network to provide mentorship, job opportunities, and industry insights. This could include 1) Creating an alum mentorship program, 2) Hosting industry panels and networking events featuring successful alums, 3) Sharing job postings and opportunities within the alum network, and 4) Highlighting alum success stories as examples for current students.

These ideas and keeping the curriculum current with industry trends would position ASM as a leader in providing well-rounded music education. It would mean ASM graduates are musically talented and business-savvy, setting them up for success and longevity in the industry. It would enhance ASM's reputation, increase graduate job placement, and build a network of successful alums. Ultimately, it would mean ASM fully prepares students to navigate and thrive in the realities of professional music careers. The following sections outline some building blocks necessary to enable these

recommendations.

### **Leverage Technology and Online Learning**

ASM should leverage technology and online learning to expand access and enhance education. This can include developing virtual and augmented reality experiences for music education (Dalgarno & Lee, 2010). Artificial intelligence and machine learning can also be implemented to support personalized learning and assessment (Luckin et al., 2016). Offering online and hybrid programs can help reach a global audience (Allen & Seaman, 2017). Data analytics can track student progress and inform instruction (Picciano, 2009).

### **Focus on Diversity, Equity, and Inclusion**

Focusing on diversity, equity, and inclusion is critical in music education. ASM should develop curricula and programs that reflect diverse musical traditions and perspectives (Vaugeois, 2007). Inclusive admissions and hiring practices and training on unconscious bias and cultural competence should be implemented. Support should be provided for students from underrepresented backgrounds, such as through scholarships and mentorship programs (Eagan et al., 2014). Partnerships with organizations serving diverse communities can help expand reach and impact (Witesman & Fernandez, 2013).

### **Emphasize Interdisciplinary Collaboration and Innovation**

Interdisciplinary collaboration and innovation should be emphasized in music education. Offering interdisciplinary programs and courses can provide students with a well-rounded education (Kivijarvi et al., 2017). Students should be encouraged to

experiment with new musical styles and genres, and opportunities for composition and improvisation should be provided (Webster, 2011). Collaborations with other institutions and industries can lead to innovative projects and initiatives (Gulati et al., 2012). Resources and support for entrepreneurship and career development in the music industry should be provided (Beech et al., 2018).

### **Prioritize Community Engagement and Social Impact**

Community engagement and social impact should be prioritized in music education. Community-based programs and partnerships should be developed, such as music education programs in schools and community centers (Elpus, 2015). Performances and events should be accessible and engaging to diverse audiences (Radbourne et al., 2010). Opportunities for service-learning and community service through music should be provided (Kajner et al., 2013). Advocacy for the importance and impact of music education at the local and national levels should be conducted (Hetland & Winner, 2001).

### **Invest in Faculty Development and Well-Being**

Investing in faculty development and well-being is critical for student success. Ongoing professional development opportunities should be provided in technology integration, diversity, and inclusion (Guskey, 2002). Support should be provided for faculty to pursue research and creative projects, and resources for professional growth and advancement should be available (Bland et al., 2009). Faculty well-being should be prioritized, including providing resources for mental health and work-life balance

(Maslach & Leiter, 2017). A positive and inclusive organizational culture should be fostered, and opportunities for leadership and voice should be provided (Ehrhart et al., 2014).

### **Focus on Sustainability and Resilience**

Finally, ASM should focus on sustainability and resilience. A long-term strategic plan should be developed to address trends and challenges in music education and the nonprofit sector (Bryson, 2018). Revenue streams should be diversified, including through grants, partnerships, and innovative fundraising models (Kearns, 2014). Sustainable practices such as energy-efficient technologies and waste reduction should be implemented in operations and facilities (Weheb & Mullen, 2017). An endowment and other reserves should be built to ensure financial stability and resilience (Zietlow, 2001).

By implementing these recommendations, ASM can stay at the forefront of music education and prepare students for success in the 21st century. Leveraging technology, focusing on diversity and inclusion, and prioritizing community engagement and social impact can help conservatories make a positive difference in the lives of students and communities.

### **Implications for Social Change**

The findings of this project have implications for social change through the power of music education. Access to music education can have transformative effects on individuals, particularly children and youth, in terms of academic achievement, social skills, and personal development. Music education programs can unite communities and

promote social cohesion and cultural enrichment. Non-profit music schools like ASM are critical in making music education accessible and inclusive, particularly for underserved populations. The model of ASM can be replicated and adapted by other non-profit music schools and organizations to expand access to music education and promote social change. Music education can provide a positive outlet and source of joy and fulfillment, contributing to individual and community well-being. Through partnerships and collaborations, music schools can help address social issues such as education inequality and cultural divides.

Music schools can implement several strategies to enhance operational effectiveness and efficiency. One essential approach is adopting technology to streamline operations and improve efficiency (Picciano, 2009). This might involve using learning management systems (LMS) to manage online and blended learning programs, customer relationship management (CRM) systems to track student and donor interactions, project management tools to coordinate events and productions, and financial management software to streamline accounting and budgeting processes (Dalgarno & Lee, 2010).

Music schools can also leverage data-driven decision-making by collecting and analyzing data to inform decision-making and improve operations (Eagan et al., 2014). This could involve using data analytics to track student enrollment trends and program demand, analyzing financial data to identify areas for cost savings and efficiency improvements, and collecting feedback data to improve student and faculty experiences (Guskey, 2002).

Process automation is another strategy that involves automating repetitive and administrative tasks to free up staff time for more strategic work (Bryson, 2018). This could include implementing online registration and payment systems for classes and events, workflow automation tools to streamline administrative processes, and automating communication and marketing efforts through email marketing and CRM systems (Radbourne et al., 2010).

Developing strategic collaborations and partnerships can also enhance operational effectiveness by leveraging resources and expertise (Witesman & Fernandez, 2013). This could involve partnering with other music schools or arts organizations to share resources and expertise, collaborating with local schools and community groups to expand outreach and impact, and developing corporate partnerships to secure funding and support (Kearns, 2014).

Fostering a culture of continuous improvement and innovation is also essential, which involves regularly reviewing and refining processes and programs based on feedback and data, encouraging staff and faculty to identify areas for improvement and propose solutions, and providing training and support for staff and faculty to develop new skills and adapt to changes (Bland et al., 2009).

Considering operations' environmental and social impact can also identify opportunities to improve sustainability (Weheb & Mullen, 2017). This could include developing sustainable financial models and practices (Hetland & Winner, 2001). Prioritizing diversity, equity, and inclusion in all aspects of operations is also crucial,

which involves implementing recruitment and admissions practices that promote diversity and inclusion, providing training and resources to promote cultural competence and equity, and offering programs and services that meet the needs of diverse student populations.

Expanding online and hybrid learning offerings can also reach more students and provide greater flexibility (Allen & Seaman, 2017). This could involve developing online courses and degree programs in music and related fields, offering virtual lessons and coaching for music students, and creating online communities and resources for music students and alums (Luckin et al., 2016).

Providing resources and training to support students in developing entrepreneurial skills and career paths in music can also enhance operational effectiveness (Beech et al., 2018). This could involve offering courses and workshops on music business and entrepreneurship, providing career counseling and job placement services, and fostering a network of music industry professionals and alums for mentorship and opportunities (Elpus, 2015).

Finally, investing in state-of-the-art facilities and technology can support music education and performance (Kajner et al., 2013). This could involve upgrading rehearsal and performance spaces with modern equipment and technology, providing access to music technology labs and recording studios, and implementing virtual and augmented reality technologies for music education and performance (Kivijarvi et al., 2017). By implementing these cutting-edge strategies, music conservatories can enhance operational

effectiveness and efficiency, providing students with high-quality education and experience while ensuring the institution's long-term sustainability (Zietlow, 2001).

### **Conclusion**

The business problem examined was that nonprofit leaders lack strategies for identifying holistic operational efficiencies and effectiveness. Therefore, this qualitative single case study explored strategies nonprofit leaders use to identify holistic performance measurements to enhance operational efficiencies and effectiveness. Given the lack of a standardized scale for measuring repeatable results in qualitative evaluations of nonprofit performance, exploring effective operational strategies used by leaders of successful small nonprofits becomes crucial.

Surveys, interviews, and case studies of nonprofits excelling in mission alignment, community service advancement, and sustainable growth provide valuable data. Identifying common themes and strategies across these organizations helps pinpoint best practices. Developing a framework or rubric based on these findings provides a more standardized performance measure. Peer networking and knowledge-sharing events also facilitate the exchange of strategies and solutions.

Collaborating with researchers, consultants, and other experts in nonprofit management brings additional expertise. By exploring the strategies of successful nonprofits and working to develop more standardized measurement methods, small nonprofit leaders can better assess and improve their own organization's alignment, service advancement, and growth.



This study has investigated the effectiveness of ASM. ASM provides high-quality music education and contributes to the community. Through its customer-focused programs, collaborative leadership, and commitment to continuous improvement, ASM has achieved solid results and positioned itself for long-term success. The findings and recommendations of this project have implications for the professional practice of music education and non-profit management, as well as for social change through the power of music education.

ASM is an example of a non-profit music school making a difference through music education. As ASM continues to grow and evolve, it is well-positioned to expand its reach and impact, enriching lives and communities through the joy and power of music. The school's commitment to accessibility, inclusivity, and quality makes it a valuable resource for the community. ASM brings people together through its programs, partnerships, and performances, promoting social cohesion and cultural enrichment.

Music education has the power to transform lives and communities. By providing access to high-quality music education, ASM is helping to develop the next generation of music lovers and leaders. The school's work aligns with the mission of making music education accessible to all, regardless of age, skill level, or background. Through its inclusive and supportive learning environment, ASM is helping students of all ages discover music's joy and benefits.

As ASM looks to the future, the school is well-positioned to continue its trajectory of success and impact. By leveraging its strengths and addressing

opportunities, ASM can expand its reach and deepen its effect. The school's commitment to continuous improvement and adaptation will enable it to navigate the changing landscape of music education and non-profit management. Through its customer-focused programs, collaborative leadership, and dedication to excellence, ASM will continue to enrich lives and communities through the power of music.

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## Appendix A: Service Order Agreement

## Project Proposal

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

## Scope of Work

[describe internship expectations and outcomes/deliverables]

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

Services Summary	Length of Engagement

Terms of confidentiality and compliance:

In all reports (including drafts shared with peers and faculty members), the student is

required to maintain confidentiality by removing names and key pieces of information that might disclose an Institution's/individual's identity or inappropriately divulge proprietary details. If the Institution itself wishes to publicize the findings of this project, that is the Institution's judgment call.

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

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

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

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

#### Ethical Conduct in this Consulting Relationship

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

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

Principle 1: Protect the integrity of Walden University

Not representing conflicting or competing interests or positioning themselves such that their interest may be in conflict or may be perceived to be in conflict with the purposes and values of Walden University

Not intentionally communicating false or misleading information that may compromise the integrity of Walden University and of the consulting capstone experience

Principle 2: Exhibit professional conduct at all times

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

Principle 3: Protect the promise of confidentiality

Not using or adapting client organization's data and information after the capstone experience, unless the information has been publically shared by the client

Not conducting telephone conferences with the client organization in public places where information may be overheard



This Project Proposal has been approved by [NAME]:

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SIGNATURE

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

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### Appendix B: Research Questions

1. How do you define operational effectiveness? Why is it important to your organization?
2. How do you ensure your organization's activities align with its mission and vision?
3. What are some key challenges nonprofit organizations face regarding operational effectiveness?
4. How do you prioritize activities and allocate resources to meet your organization's objectives?
5. How do you measure the success of your organization's operational activities?
6. What are some critical metrics you track to gauge your organization's operational efficiency?
7. How does your organization collaborate with other nonprofit organizations to enhance its operational effectiveness?
8. How do you ensure that your organization's policies and procedures comply with relevant regulations, ethical standards, and best practices?
9. How does your organization use technology to improve and streamline its operations?
10. What strategies do you use to recruit and retain qualified staff for your organization?