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Effective Community Awareness Strategies for Nonprofit Sustainability and Performance

Lina Gabrielle Rugova
Walden University

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Walden University

College of Management and Human Potential

This is to certify that the doctoral study by

Lina G. Rugova

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

Review Committee

Dr. Denise Land, Committee Chairperson, Doctor of Business Administration Faculty

Chief Academic Officer and Provost
Sue Subocz, Ph.D.

Walden University
2026

Abstract

Effective Community Awareness Strategies for Nonprofit Sustainability and Performance

by

Lina G. Rugova

MM, Pennsylvania State University, 2022

BS, Pennsylvania State University, 2020

Consulting Case Study Business Research Project Submitted in Partial Fulfillment

of the Requirements for the Degree of

Doctor of Business Administration

Walden University

March 2026

Abstract

The absence of formalized governance, measurement systems, and standardized processes in nonprofit organizations can limit performance, accountability, and long-term sustainability. Nonprofit executive leaders and board members are concerned about fulfilling their responsibilities for organizational effectiveness and community social effectiveness. Grounded in the Baldrige Excellence Framework and the resource-based view theory, the purpose of this qualitative single case study was to explore strategies nonprofit leaders use to improve organizational performance and governance effectiveness. The participants were six organizational leaders and board members from a Canadian nonprofit training organization. Data were collected through semistructured interviews and analysis of organizational documents, and were analyzed using Yin's five-step process and thematic analysis. Four themes emerged: (a) strong mission alignment and stakeholder trust, (b) effective but informal and undocumented processes, (c) committed workforce and governance structures with communication and role clarity challenges, and (d) modest performance results with gaps in measurement and outcome evaluation. A key recommendation is for nonprofit organization leaders to implement formal performance measurement systems aligned with strategy. The implications for positive social change include the potential to strengthen nonprofit accountability, improve service delivery outcomes, and enhance workforce readiness and community safety for individuals, businesses, and public sector stakeholders.

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Dedication

This work is dedicated to my husband, Arben Rugova, whose unwavering support and belief in me made this journey possible; to my three sons, Dion, Erik, and Liyo, who are my constant source of purpose and motivation; and to my mother and my in-laws, whose encouragement, strength, and presence have grounded me throughout this process.

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I am especially grateful to my Canadian consulting client for their openness, collaboration, and trust in this process. Their willingness to share experiences and organizational insights made this research both meaningful and impactful.

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Section 1: Project Foundation

Background of the Problem

Nonprofit leaders in Canada experience significant challenges in achieving financial sustainability and operational efficiency. Despite offering essential services, such as first aid training and community medical support, some organizations struggle with resource management, instructor retention, effective marketing, and diversifying revenue streams. According to Berenguer et al. (2024), nonprofit organizations often struggle to balance paid staff and volunteers, leading to inefficiencies and affecting service delivery. Additionally, Gandrita (2023) highlighted that the lack of strategic planning and financial management practices can further hinder nonprofit sustainability. These operational inefficiencies can limit an organization's capacity to meet its mission and long-term goals, especially in the post-COVID environment, where demand for services is high, but revenue generation remains inadequate.

Business Problem Focus and Project Purpose

The specific business problem is that nonprofit leaders in some Canadian nonprofit organizations lack effective strategies to optimize operational efficiency, enhance instructor retention, and diversify revenue streams to ensure long-term financial sustainability and positive social change within the community. Therefore, the purpose of this qualitative single case study was to identify and explore effective strategies that a Canadian nonprofit organization's leaders use to optimize operational efficiency, enhance instructor retention, and diversify revenue streams to ensure long-term financial sustainability and positive social change within the community.

The target population for this research project consisted of nonprofit business leaders from a single Canadian nonprofit organization involved in this consulting capstone research project. Five nonprofit business leaders were purposely sampled from the consulting client organization participating in this consulting capstone project. The participant eligibility criteria included nonprofit business leader(s) from the Canadian nonprofit organization involved in this consulting capstone research project who are responsible for the determination of effective strategies to optimize operational efficiency, enhance instructor retention, and diversify revenue streams to ensure long-term financial sustainability and positive social change within the community.

The qualitative methodology was appropriate for this project because it allowed for a deep understanding of the specific challenges experienced by nonprofit leaders in Canada. The qualitative approach was particularly effective for identifying and exploring the experiences, perceptions, and strategies of nonprofit leaders in addressing operational inefficiencies and financial sustainability. The qualitative method provided a contextualized understanding of the problem, which was essential for developing tailored solutions that align with the organization's mission and long-term goals (see Yin, 2018). In business research, case studies are often used to identify, explore, and understand complex organizational challenges and strategies within a specific context (Yin, 2018). The case study design was particularly appropriate for this research because it allowed for an in-depth investigation into the operational inefficiencies and financial sustainability challenges faced by nonprofit leaders in Canada. By focusing on a single case, my capstone project's findings identified and explored the unique environment and

strategic decision-making processes of a nonprofit organization. Using this design enabled me to gather comprehensive insights from key leaders, providing a detailed understanding of the issues at hand and identifying potential best practices to improve organizational performance and sustainability (Yin, 2018).

All data were collected virtually from leaders within the consulting project client nonprofit organization via phone, email, or virtual meeting platforms. The data collection process included (a) semistructured interviews with the nonprofit organization's business leaders, focusing on their experiences, perceptions, and strategies regarding operational efficiency, instructor retention, marketing, and revenue generation guided by the Baldrige Excellence Framework criteria (see Appendix A); (b) existing internal archival data, such as records, reports, and documents released by the organization leader, which will provide insights into current operational practices and financial challenges; (c) public data, such as publicly available reports, websites, and community feedback, to understand the broader context in which the organization operates; and (d) literature, including books, peer-reviewed articles, and other relevant bodies of written research that provide a theoretical foundation and potential best practices related to nonprofit management, financial sustainability, and strategic planning. A thematic analysis was used for the data analysis process. This approach involved identifying, analyzing, and reporting patterns (themes) within the data to identify and explore the key issues and strategies nonprofit leaders use to address operational inefficiencies and financial sustainability challenges. Member checking was also employed to ensure the accuracy and credibility of the findings by allowing participants to review and validate the interpretations of their

responses. Additionally, data saturation was used to ensure sufficient data were collected to fully address the research question. Methodological triangulation was utilized by incorporating multiple data sources (interviews, archival documents, and public data) to ensure the validity and robustness of the study's findings. The composite conceptual framework is the Baldrige Excellence Framework (BEF) and Penrose's resource-based view (RBV) of competitive advantage.

Project Research Question

What effective strategies do a Canadian nonprofit organization's leaders use to optimize operational efficiency, enhance instructor retention, and diversify revenue streams to ensure long-term financial sustainability and positive social change within the community?

Assumptions and Limitations

Assumptions

Assumptions are defined as facts considered to be true but cannot be verified directly, carrying inherent risk due to their unconfirmed nature (Yin, 2018). The assumptions underpinning this study include the belief that the nonprofit organization under investigation operates consistently with typical nonprofit sector practices, especially concerning volunteer management, strategic planning, and resource allocation. It was assumed that the organization's leadership possesses an adequate understanding of and access to strategic frameworks, such as the BEF, necessary to address their operational challenges (Baldrige Performance Excellence Program, 2023). Additionally, the assumption was made that data gathered through interviews and organizational

documents would authentically reflect participant perspectives and the current organizational conditions, assuming their full and honest participation. Finally, it was assumed that the study's findings may generalize to other nonprofits with comparable operational structures, particularly those emphasizing volunteerism and community engagement.

Limitations

Limitations refer to potential weaknesses or constraints of the research, which are beyond the researcher's control and may influence the study's outcomes (Yin, 2018). A key limitation of this research is the use of a single-case study design, which restricts generalizability. Findings drawn from one nonprofit organization may not apply to others, particularly those with different operational strategies or stakeholder engagement models (Gandrita, 2023). Furthermore, reliance on qualitative data, such as interviews and document reviews, introduces potential biases stemming from participant subjectivity, potentially resulting in discrepancies between reported perceptions and actual organizational practices (Piatak & Carman, 2023). The exclusive focus on leadership, volunteer management, and strategic planning also represents a limitation by omitting an in-depth analysis of other critical operational aspects, including financial management, marketing, or fundraising, which could influence the comprehensive understanding of nonprofit operational effectiveness (see Berenguer et al., 2024).

Business Project Ethics

Researcher Role in Data Collection

In qualitative research, particularly involving interviews, the researcher plays a critical role in maintaining the ethical integrity of the data collection process. Researchers must ensure that participants feel safe, secure, and respected, facilitating honest and open participation (Nii Laryeafio & Ogbewe, 2023). In this research project, I personally conducted audio-recorded semistructured interviews with senior leaders of the nonprofit organization, followed by transcription and analysis. The primary interview questions are included in Appendix A. Additionally, archival data and organizational documents deemed appropriate by leadership supplemented these primary data sources. Participants had opportunities to clarify and confirm statements through member checking.

Relationship With Participants

I have established a professional consulting relationship with the nonprofit organization involved in this study. This engagement facilitates access to organizational leaders and internal documents essential for the research. Throughout the research process, transparency, confidentiality, and impartiality will be maintained to uphold the trust and collaboration required for successful qualitative inquiry (see Tursunbayeva et al., 2021). These conditions indicate that the existing consulting relationship enhances the depth and validity of the study by enabling richer data collection while maintaining the professional boundaries needed to protect participant integrity and research credibility.

Ethical Protocol and The Belmont Report

Adhering to the ethical guidelines outlined in *The Belmont Report* (Department of Health, Education, and Welfare, & National Commission for the Protection of Human Subjects of Biomedical and Behavioral Research, 2014), this research project was guided by three core ethical principles: respect for persons, beneficence, and justice. Respect for persons was upheld by obtaining informed consent from all participants and ensuring their autonomy was protected throughout the study. Beneficence was addressed by minimizing any potential risks to participants and maximizing the potential benefits of the study for both the individuals involved and the organization as a whole. Justice was ensured through the equitable selection of participants based on their roles and relevance to the study's purpose, avoiding any form of exploitation or undue burden. These principles were operationalized through transparent communication, voluntary participation, confidentiality measures, and a structured informed consent process in accordance with Institutional Review Board (IRB) approval. The project complies fully with Walden University's IRB expectations and has received approval (Approval No. 01-07-25-1227810).

Prior to initiating data collection, a Service Order Agreement (see Appendix B) was established between me and the participating organization. This agreement clarified the scope of the consulting engagement, deliverables, confidentiality terms, and ownership of project outputs. Including the Service Order Agreement ensures transparency of the professional boundaries between the consulting and research

components of this project. Only the template version is included in this document; the signed original remains confidential in accordance with institutional policy.

IRB Expectations and Informed Consent

Informed consent was explicitly obtained from all participants via email communication, clearly detailing the purpose, nature, and procedures of the study, along with assurances regarding anonymity, confidentiality, and voluntary participation (see Consent Form).

- ***Procedures for Participant Withdrawal.*** Participation in this research was entirely voluntary. I informed participants that they could withdraw at any point without penalty by simply notifying me.
- ***Incentives.*** Participants will receive a \$10 Amazon gift card as a thank you for their time and contributions. This small token of appreciation is not intended to influence participation but rather to acknowledge the time invested in the interview process.
- ***Protection of Participant Confidentiality.*** Interview transcripts and audio recordings were anonymized by removing personally identifiable information such as names, job titles, and department references before analysis or dissemination. For example, instead of using actual names, participants were assigned codes such as “P1” or “Participant A” to ensure their identity remained confidential throughout the study. Only generalized patterns and themes will be shared publicly.

- **Data Security.** All collected data will be securely stored in encrypted, password-protected files on my private computer. These files will be retained for 5 years in compliance with Walden University's IRB requirements, after which they will be securely deleted.
- **Interview Questions.** The interview protocol and questions were provided in Appendix A and guided the semistructured data collection process.

This adherence to ethical guidelines was intended to protect participant rights and strengthen the credibility and reliability of the research findings.

Evidence-Based Integrative Review

This evidence-based integrative review synthesizes scholarly and applied research on nonprofit sustainability, leadership continuity, performance measurement, and strategic resource management. The purpose of this qualitative single case study was to identify and explore effective strategies that a Canadian nonprofit organization's leaders use to optimize operational efficiency, enhance instructor retention, and diversify revenue streams to ensure long-term financial sustainability and positive social change within the community. This integrative literature review synthesizes scholarly research on strategy development, leadership practices, and performance measurement systems relevant to nonprofit organizations, framing these findings within the context of the BEF.

The reviewed literature encompasses scholarly journals, seminal books, and government reports, offering a comprehensive understanding of the management challenges experienced by nonprofit organizations. The search strategy included keywords such as *nonprofit sustainability*, *strategic planning in nonprofits*, *leadership*

continuity, volunteer management, performance measurement, Baldrige Excellence Framework, nonprofit marketing strategy, technology adoption in nonprofits, human resource practices, and nonprofit board governance. Across these sources, strategic human resource (HR) management consistently emerges as a core element in strengthening leadership pipelines and improving organizational resilience. Baluch and Ridder (2020) emphasized that HR systems in nonprofits often lack formal structures to support learning, performance development, and leadership continuity, leaving organizations vulnerable to turnover and operational disruption. Likewise, Berenguer et al. (2024) demonstrated that leadership continuity significantly shapes organizational culture, decision-making, and organizational continuity, reinforcing the need for intentional succession planning and leadership development mechanisms. Collectively, this evidence indicates that nonprofit effectiveness relies not only on mission clarity but also on building internal systems that support leadership stability and workforce capability, establishing a foundation for the next topic on performance measurement and organizational learning.

Performance measurement is another significant theme in the literature, with research demonstrating the necessity of adopting robust systems that effectively align organizational strategies with measurable outcomes. The BEF serves as a valuable tool for nonprofit organizations to systematically measure and improve performance across multiple dimensions, including leadership, strategic planning, and operational effectiveness (Baldrige Performance Excellence Program, 2023). Scholars have critically analyzed the application of the BEF in nonprofit settings, underscoring its potential to

facilitate organizational learning, continuous improvement, and strategic alignment (Ávila et al., 2024). This literature review critically integrates these diverse scholarly perspectives, synthesizing findings to illustrate best practices and theoretical underpinnings that inform effective strategy development within nonprofits. By providing evidence-based insights, this review demonstrates the depth and breadth of scholarly inquiry, supporting the strategic framework employed in the consulting project. Ultimately, synthesizing this literature will enhance understanding of how nonprofits can successfully navigate leadership transitions, optimize operational efficiencies, and leverage performance measurement to foster organizational sustainability and societal effect.

Application to the Applied Business Problem

The core business problem in this consulting project centered on the operational and leadership challenges that limited the ability of the Training Safety Organization (TSO) to strengthen community engagement and support stable revenue. Prior studies have shown that nonprofit organizations often face leadership gaps, workforce instability, and financial constraints that reduce their capacity for consistent stakeholder communication (Baluch & Ridder, 2020; Berenguer et al., 2024; Ontario Nonprofit Network [ONN], 2024). These conditions affected donor confidence and made it difficult for organizations to plan long-term outreach strategies. Analysis of the literature indicated that improvements in leadership continuity, workforce capability, and administrative systems created the internal structure needed to support effective community awareness efforts. This connection establishes the foundation for the next

section, which examines how targeted strategies can enhance organizational stability and public engagement.

This review compared findings from diverse geographic and organizational contexts to understand the broader applicability of these strategies. While most studies focused on nonprofits in the United States and Europe, the inclusion of Canadian-focused reports and case examples strengthened the relevance to this project's context. For instance, Moura et al. (2022) emphasized the adaptability of BEF principles across different nonprofit environments, reinforcing the framework's utility for organizations facing constrained resources.

Ultimately, this integrative review established a scholarly foundation for the consulting recommendations delivered to the nonprofit client. By identifying commonalities and contrasts in prior research, the review provided evidence-based insights into leadership, strategy, and measurement systems that directly supported the project's goals of enhancing instructor retention, operational efficiency, and revenue diversification. The purpose of this study was to identify and explore effective strategies that Canadian nonprofit organization leaders use to optimize operational efficiency, enhance instructor retention, and diversify revenue streams to ensure long-term financial sustainability and positive social change within the community. Through a qualitative case study approach, the project intended to address challenges in leadership transitions, instructor retention, and limited revenue streams. The consulting outcomes were designed to help the organization align its operations with best practices in the nonprofit sector, guided by the BEF and informed by relevant research literature.

Conceptual Framework

The composite conceptual framework for this research project integrates two complementary theories: the BEF and the RBV. The BEF offers a systems-based model for organizational performance improvement, emphasizing leadership, strategy, customer engagement, measurement, workforce, and operations (Baldrige Performance Excellence Program, 2023). The RBV, originally articulated by Penrose (1959) and expanded by Barney (1991), focuses on how organizations gain and sustain competitive advantage by strategically managing valuable, rare, inimitable, and nonsubstitutable resources. Together, these frameworks provide a comprehensive lens for examining how nonprofits can align strategic leadership, operational processes, and internal resources to improve retention, optimize efficiency, and strengthen financial sustainability.

Baldrige Excellence Framework

The BEF, created by the National Institute of Standards and Technology (NIST), is a widely adopted model for organizational performance improvement. It emphasizes systems thinking and strategic management across six core categories: leadership, strategy, customers, measurement, workforce, and operations (Baldrige Performance Excellence Program, 2023). Nonprofit organizations benefit from BEF's alignment with mission-focused outcomes and operational constraints.

Leadership and Strategy. The leadership category of the BEF emphasized ethical governance, direction-setting, and stakeholder engagement as foundations for sustainable performance. Geib and Boenigk (2022) found that shared leadership models increase continuity and reduce fragility during leadership transitions, while McCaig et al.

(2022) highlighted that many Canadian nonprofits rely on informal mentoring and board-led recruitment instead of structured succession pipelines. Baluch and Ridder (2020) demonstrated that integrating strategic HR practices sustains mission delivery by building workforce capacity. Alanazi (2025) further argued that ethical leadership strengthens trust and organizational stability, especially in contexts marked by instructor turnover or operational inefficiencies. Together, these findings underscore a gap between theory and practice: while BEF emphasizes structured leadership systems, Canadian nonprofits often lack the infrastructure to implement them, leaving organizations vulnerable to knowledge loss and staff attrition. The ONN (2025b) reported that more than 60% of equity-focused nonprofits struggle with leadership continuity because of limited compensation resources. For the nonprofit client in this study, applying BEF's leadership category offers a pathway to embed accountability and continuity into governance, directly addressing retention challenges and mission sustainability.

Strategic Planning. The strategy category of BEF requires organizations to align goals with data, stakeholder input, and long-term mission outcomes. Locke and Fritschle (2022) proposed a nonprofit portfolio strategy model that integrates data-driven decision-making into planning. Similarly, Moura et al. (2022) found that structured planning processes improve adaptability in dynamic environments, while Alanazi (2025) demonstrated that BEF adoption improves results by linking business model implementation to strategic alignment. In contrast, many Canadian nonprofits continue to rely on ad hoc planning approaches because of limited administrative capacity, which weakens their ability to diversify revenue and prepare for crises. Jensen (2024) reported

that during the post-pandemic recovery, many organizations lacked contingency strategies, leaving them dependent on single sources of income and vulnerable to disruption. BEF addresses these limitations by requiring leaders to analyze external conditions, incorporate stakeholder perspectives, and align resources with strategy. For the client organization, adopting BEF's strategic planning practices provides a framework for building financial sustainability and resilience in the face of ongoing funding volatility.

Stakeholder Engagement. The customer category of the BEF emphasizes stakeholder engagement as an avenue for building long-term trust with beneficiaries and funders. Cao et al. (2024) argued that sustainable excellence depends on designing services that respond to stakeholder needs. Geib and Boenigk (2022) found that leadership models that distribute authority increase transparency and strengthen stakeholder confidence, while ONN's (2024) State of the Sector report revealed that Canadian nonprofits are experiencing declining donor trust and engagement in the wake of the pandemic. These findings suggest that structured feedback loops and customer-centered planning, central to BEF, are essential for nonprofits seeking to sustain both revenue and legitimacy. For the client, prioritizing stakeholder engagement in alignment with BEF principles can enhance fundraising outcomes and reinforce its role as a trusted community partner.

Measurement and Performance. The workforce category within BEF emphasizes the alignment of employee capability, engagement, and well-being with mission objectives. Berenguer et al. (2024) found that effective volunteer management

enhances service delivery, while Piatak and Carman (2023) demonstrated that recognition and professional development increase retention. Yet, the ONN (2025a) reported that undercompensation remains one of the primary drivers of turnover in Canadian nonprofits. BEF reframes workforce practices as strategic levers for performance, highlighting the importance of aligning both paid staff and volunteers with organizational goals. For the client, this alignment directly addresses instructor retention, ensuring service continuity and long-term community impact.

Workforce Development. The workforce category within the BEF emphasized the alignment of employee capability, engagement, and well-being with mission objectives. Berenguer et al. (2024) found that effective volunteer management enhances service delivery, while Piatak and Carman (2023) demonstrated that recognition and professional development increase retention. Yet, the ONN (2025a) reported that undercompensation remains one of the primary drivers of turnover in Canadian nonprofits. BEF reframed workforce practices as strategic levers for performance, highlighting the importance of aligning both paid staff and volunteers with organizational goals. For the client, this alignment directly addresses instructor retention, ensuring service continuity and long-term community impact.

Process Optimization and Operations. Finally, the process optimization dimension of BEF encourages nonprofits to pursue continuous improvement by refining internal operations. The framework positions streamlined processes as essential for efficiency and adaptability (Baldrige Performance Excellence Program, 2023). Nikita et al. (2024) found that nonprofits with integrated digital processes were better able to adapt

to post-pandemic demands, while many others continued to struggle with outdated systems and manual workflows. Applying BEF's process orientation enables organizations to identify inefficiencies, eliminate redundancy, and embed innovation in daily operations. For the client, adopting these practices provides a clear roadmap for strengthening internal systems and aligning service delivery with evolving community expectations.

Results. The results category of the BEF emphasizes measurable outcomes across financial, operational, workforce, and stakeholder domains. This category provides evidence of how well an organization's leadership, strategy, and processes translate into tangible performance improvements (Baldrige Performance Excellence Program, 2023). Alanazi (2025) noted that the results dimension offers nonprofits a structured way to demonstrate mission alignment and accountability, both of which are increasingly demanded by funders and regulatory bodies. In practice, results include not only financial metrics but also indicators of community impact, volunteer retention, and stakeholder satisfaction.

For Canadian nonprofits, where external reporting often focuses narrowly on compliance, BEF's results criteria provide a broader lens for assessing sustainability. Shields et al. (2024) found that many organizations reported survival during the pandemic but lacked data to demonstrate the effectiveness of their services or their community value. By adopting BEF's results category, nonprofits can showcase both operational efficiency and social impact, strengthening their credibility with donors and community partners. For the client organization, embedding results-focused evaluation

ensures that program outcomes, such as instructor retention and community engagement, are not only achieved but also systematically documented and tracked. This approach closes the loop between strategy, operations, and impact, reinforcing the organization's long-term sustainability.

Resource-Based View

The RBV authors provided a complementary lens to the BEF by focusing on the internal resources that enable organizations to achieve long-term organizational viability. Unlike external or process-oriented frameworks, RBV authors emphasized that mission success depends on assets that are valuable, rare, inimitable, and nonsubstitutable (Barney, 1991; Penrose, 1959). In nonprofit organizations, these resources often include human capital, culture, reputation, networks, and digital capabilities, which collectively form the foundation for operational resilience. Applying RBV to the nonprofit sector highlighted how intangible resources such as trust, relationships, and workforce commitment created advantages that supported mission continuity even in the face of funding volatility and regulatory constraints.

Origins and Theoretical Development. The RBV was introduced by Penrose (1959) in *The Theory of the Growth of the Firm* and later advanced by Barney (1991). Penrose emphasized that organizational growth depends not only on external market opportunities but also on the effective use of internal resources, including both tangible and intangible assets. Barney (1991) refined this perspective through the valuable, rare, inimitable, and nonsubstitutable (VRIN) framework, which highlights that resources provide sustained advantage when they are valuable, rare, inimitable, and

nonsubstitutable. Ferreira and Ferreira (2025) traced the progression of RBV research, noting that while it originated in competitive for-profit contexts, it has been adapted for diverse organizational forms, including nonprofits. This adaptability underscores RBV's relevance for resource-constrained organizations that rely heavily on intangible assets such as trust, reputation, and consistency with mission priorities.

Human Capital. Among nonprofit organizations, human capital is one of the most critical VRIN resources. Staff, volunteers, and boards form the backbone of operations, and their skills and motivations are central to achieving mission objectives. Oelberger (2024) found that strong job–person fit increases both satisfaction and organizational performance, reducing turnover. In Canada, the ONN (2025a) reported that undercompensation and burnout remain leading drivers of attrition, undermining continuity. McCaig et al. (2022) revealed that many Canadian nonprofits rely on informal recruitment processes rather than formal talent management systems, which restricts equitable advancement and increases vulnerability during leadership transitions. These findings reinforce that human capital is both valuable and rare in nonprofits, as staff and volunteers who are motivated by mission-driven goals cannot easily be replicated. Piatak and Carman (2023) further demonstrated that volunteer engagement strategies have a direct impact on retention and service quality, underscoring the importance of workforce development as a VRIN resource. For the client organization, aligning staff and volunteer skills with strategic priorities is essential to retention and long-term impact.

Culture, Reputation, and Networks. Organizational culture, reputation, and networks represented additional intangible resources central to the RBV. Maier et al.

(2024) found that investments in culture and relationships strengthened adaptability during disruptions, while Ávila et al. (2024) argued that community trust improved funding access and stakeholder responsiveness. Reputation functioned as a distinctive resource that was difficult to imitate, particularly when built on long-standing credibility and alignment with organizational purpose. Hesse (2025) demonstrated that nonprofits that integrate donor analytics into fundraising strategies strengthen reputational capital by converting occasional donors into long-term supporters. Networks also play a vital role in expanding nonprofit capacity, as Ferreira and Ferreira (2025) highlighted through their emphasis on relational capital as a resource for sustaining performance. In the Canadian context, partnerships across government, community coalitions, and sector alliances are rare and difficult to replicate, making them critical resources for resilience and sustainability.

Digital Competence and Dynamic Capabilities. The RBV scholarship increasingly recognizes digital capacity and dynamic capabilities as essential resources for long-term advantage. Nikita et al. (2024) described digital transformation as requiring not only technical tools but also cultural and organizational readiness. Ávila et al. (2024) emphasized that digital literacy, agile practices, and data use are strategic capabilities that strengthen resilience in uncertain environments. This aligns with Teece's (2007) dynamic capabilities framework, which builds on RBV by emphasizing the ability to sense opportunities, seize them, and reconfigure resources to sustain advantage. For Canadian nonprofits, ONN (2024) reported that many organizations lack the information technology (IT) infrastructure or trained staff to implement robust digital systems,

leaving them less competitive in attracting funding and demonstrating impact. For the client organization, building digital competence represents a unique opportunity to transform operations and enhance accountability.

Challenges and Critiques. Although RBV offers a valuable framework, its application to nonprofits is not without limitations. Critics note that the theory was designed for competitive markets, where outperforming rivals is the primary objective, while nonprofits focus on social missions. Hung et al. (2025) found that regulatory demands often restrict flexibility in the nonprofit sector, limiting the redeployment of resources. Hoang et al. (2024) further showed that funding volatility during the COVID-19 pandemic prevented nonprofits from investing in their most valuable resources, such as staff training and digital tools. These findings underscore the need to adapt RBV for nonprofit realities, where the emphasis lies in sustaining mission continuity rather than achieving competitive dominance. Despite these constraints, the RBV remains highly relevant when reframed for mission-driven organizations. By prioritizing resources that are unique, mission-aligned, and difficult to replicate, such as workforce commitment, community trust, and relational networks, nonprofits can enhance both efficiency and long-term sustainability.

For the client nonprofit, RBV underscores why intangible assets such as instructor expertise, community trust, and relational networks are central to sustainability. Unlike financial capital, which is often volatile and restricted by funder requirements, these resources are embedded within the organization's people and relationships, making them difficult for competitors to replicate. Instructor retention, in particular, represents a

valuable and rare resource that directly shapes program quality and community credibility. Similarly, the organization's local reputation and partnerships with volunteers and community leaders serve as inimitable assets that enhance responsiveness and funding opportunities. By applying RBV, the research frames these internal capabilities as strategic levers that can be intentionally developed and aligned with long-term goals, positioning the client to strengthen operational efficiency and deepen social impact despite resource constraints.

Integration of BEF and RBV

The integration of the BEF and the RBV offers a complementary, practice-oriented approach for strengthening nonprofit strategy and operations. While RBV focuses on identifying, cultivating, and protecting unique internal assets, such as leadership expertise, volunteer commitment, and community trust, BEF provides a structured system for aligning those assets with measurable performance outcomes and mission fulfillment (Alanazi, 2025; Barney, 1991). Together, these frameworks move beyond theory to offer actionable pathways for sustaining organizational resilience in resource-constrained environments.

Applied in tandem, BEF and RBV enable nonprofits to embed capacity-building efforts directly into strategic planning. For instance, succession planning can be informed by BEF's leadership system criteria while drawing on RBV's emphasis on preserving organization-specific knowledge as a rare and valuable resource. Workforce engagement strategies benefit from BEF's workforce-focused performance measures, while RBV reinforces the development of human capital as a source of sustained competitive

advantage. Additionally, this integration supports the adaptability outlined in Seo et al.'s (2026) ambidexterity model, which calls for balancing operational stability with ongoing innovation. By systematically linking resources to outcomes, nonprofits can improve decision-making, demonstrate accountability, and position themselves to meet evolving stakeholder and community needs with both agility and strategic discipline.

Business Problem Scholarship Evidence

The specific business problem was that nonprofit leaders in some Canadian nonprofit organizations lacked effective strategies to optimize operational efficiency, retain instructors, and diversify revenue streams to ensure long-term financial sustainability and social impact. Recent studies have confirmed that these challenges are widespread across the sector, reflecting persistent instability and limited organizational capacity (Jensen, 2024; Maier et al., 2024). Jensen (2024) found that post-pandemic workforce volatility and declining donor engagement eroded many nonprofits' ability to sustain programs, while Maier et al. (2024) identified resource scarcity and leadership turnover as key barriers to strategic consistency. Similarly, Baluch and Ridder (2020) demonstrated that unplanned leadership transitions often result in mission drift and fragmented decision-making, particularly in organizations lacking formal succession structures. Alanazi (2025) and Moura et al. (2022) added that without integrated performance measurement systems, nonprofits struggle to evaluate strategic effectiveness, communicate outcomes to funders, and build institutional learning. Together, this evidence suggested that operational fragility in the nonprofit sector stems from the intersection of leadership gaps, workforce instability, and underdeveloped

management systems. Addressing these interrelated constraints requires strategic development frameworks that link leadership continuity, HR optimization, and data-driven planning into a unified approach that supports sustainable organizational growth and measurable community outcomes.

The main point of this section is that the reviewed scholarship establishes a strong foundation for understanding how leadership continuity, workforce stability, operational efficiency, and diversified revenue strategies influence a nonprofit's ability to strengthen community awareness and increase donations. The evidence from peer-reviewed journals, government reports, and seminal theories shows that these internal capacities shape how organizations communicate value to stakeholders and maintain donor confidence (Geib & Boenigk, 2022; Hoang et al., 2024; ONN, 2024). Analysis of this literature highlighted that studies published since 2020, supported by foundational work such as Penrose's RBV, consistently link internal capability development with stronger public engagement and financial outcomes. This scholarly base reinforces the relevance of exploring community awareness strategies because effective donor outreach depends on stable leadership, consistent messaging, and operational reliability. Comparative insights from the United States and Europe are included to situate Canadian nonprofit performance within a broader global context. Foundational theories such as Penrose's RBV contribute conceptual depth by identifying intangible resources, including trust, reputation, and mission alignment, as essential assets that support donor confidence and long-term financial sustainability. This body of evidence demonstrates that effective community awareness strategies depend not only on external outreach but also on the

internal capacities that enable consistent communication and public visibility. These insights create a logical transition to exploring the specific practices nonprofit leaders use to build awareness within their communities and increase donations.

Seo et al. (2026) emphasized that nonprofit leaders needed to adopt adaptive strategies to balance mission complexity with operational accountability in volatile environments. Maier et al. (2024) similarly found that investing in culture and relational networks improved adaptability during disruptions. These studies highlighted the need for integrated approaches that combine succession planning, workforce optimization, and data-informed decision-making. The combined use of the BEF and the RBV offers a structured, evidence-based method to align mission objectives with measurable outcomes, strengthen capacity, and promote sustainable growth in resource-constrained settings.

Leadership Continuity and Succession Gaps

Leadership instability is a critical vulnerability for many small to mid-sized nonprofits. Geib and Boenigk (2022) found that leadership over-centralization and lack of succession planning contribute to organizational fragility, with transitions often resulting in decreased program stability and morale. While McCaig et al. (2022) emphasized Canadian nonprofits' reliance on informal succession processes, Geib and Boenigk (2022) suggested that shared leadership models can mitigate these vulnerabilities by distributing responsibilities and fostering knowledge transfer. Similarly, Siambi (2022) cautioned that reactive succession planning often results in mission drift and operational disruptions, especially when institutional knowledge is concentrated among long-tenured

leaders. Baluch and Ridder (2020) reinforced that nonprofits without deliberate leadership pipelines struggle to align leadership transitions with long-term strategy. In Ontario, the ONN's (2025b) *Data Profile of Ontario's B3 Nonprofits* showed that staffing gaps in equity-focused organizations were often filled with volunteers, but 61% of these organizations, which were led by and serving Black communities, struggled to retain them, compounding leadership and capacity challenges. These patterns also suggested that community awareness and public visibility may influence an organization's ability to attract and sustain volunteer support, which in turn contributes to public trust and donor confidence. Together, these findings demonstrated that leadership continuity was not only an internal governance concern but also a determinant of organizational resilience.

Workforce Retention and Operational Strain

Retention challenges for both paid staff and volunteers undermine the operational stability of Canadian nonprofits. Piatak and Carman (2023) observed that nonprofits operating on thin margins often experience increased turnover during leadership transitions, leading to decreased performance and less alignment with their mission. Berenguer et al. (2024) highlighted that sustained volunteer and instructor engagement is essential for service continuity, particularly in education and community-based programs. Baluch and Ridder (2020) noted that high turnover frequently follows organizational crises, exacerbating instability. According to the ONN's (2025a) *Cost of Undercompensation* report, many organizations cannot offer competitive wages or benefits, leading to persistent attrition and skill shortages in areas critical to

sustainability, such as grant writing and fundraising. Statistics Canada (Government of Canada, Statistics Canada, 2024) data further revealed that although 41% of nonprofits reported increased demand for services, less than a quarter increased their capacity to meet that demand. The convergence of low compensation, rising service demand, and volunteer attrition illustrates how workforce retention issues directly constrain a nonprofit's ability to fulfill its mission.

Financial Vulnerability and Revenue Diversification Challenges

Financial vulnerability remained a pressing concern for nonprofits, particularly smaller organizations dependent on limited funding sources. Hoang et al. (2024) found that organizations with diversified revenue streams, including grants, donations, and earned income, were better positioned to adapt to crises and maintain operations, whereas reliance on a single source increased vulnerability. Statistics Canada (Government of Canada, Statistics Canada, 2024) reported that many small to mid-sized nonprofits faced difficulty balancing revenue sources while managing increased service expectations. The ONN's (2025b) data showed that 68% of B3 nonprofits, defined as Black-led and Black-serving organizations, experienced stagnant or declining revenue post-pandemic, with 77% reporting increased expenses. This financial strain limited investments in technology, staff retention, and organizational development, further reinforcing the cycle of operational fragility. These conditions highlighted why effective community awareness and donor engagement strategies are essential, as increased visibility and trust directly influence donation levels and help stabilize revenue in resource-constrained environments.

Post-Pandemic Sector Disruptions and Innovation Needs

The COVID-19 pandemic accelerated structural shifts in nonprofit operations, exposing gaps in technology adoption, hybrid service delivery, and strategic resilience planning. Jensen (2024) reported that Canadian nonprofits have been slower to recover than for-profit firms due to limited technological capacity and reliance on in-person services. The ONN's (2024) *State of the Sector* survey found that post-pandemic erosion of engagement was particularly severe among organizations without hybrid infrastructure or adequate digital capacity. Nikita et al. (2024) and the ONN also documented that small nonprofits face significant barriers in leveraging digital tools for fundraising, service delivery, and internal operations. These challenges are compounded by a lack of dedicated IT staff and insufficient training, leaving many nonprofits unable to implement innovation strategies that could improve efficiency and engagement.

Across these themes, the literature showed that leadership instability, workforce attrition, financial strain, and limited technological capacity operated as interconnected barriers to nonprofit sustainability. Researchers found that organizations without coordinated strategies for succession planning, staff engagement, diversified revenue, and digital adoption were more likely to face service disruption and reduced stakeholder trust (Alanazi, 2025; Ávila et al., 2024; Geib & Boenigk, 2022; Hoang et al., 2024; Locke & Fritschle, 2022; ONN, 2024; Seo et al., 2026). These studies supported the use of structured frameworks such as the BEF and the RBV, which provided systematic methods to align resources with mission outcomes and strengthen long-term resilience (Baldrige Performance Excellence Program, 2023; Barney, 1991). This evidence linked

directly to the applied business problem by showing how operational fragility arose when nonprofits lacked integrated strategies for strengthening internal systems.

Business Topic Scholarship

The following analysis offers a critical synthesis of scholarly literature relevant to the business problem addressed in this study: leadership instability, instructor retention challenges, and constrained revenue diversification in nonprofit organizations. Drawing from evidence-based frameworks, this scholarship supports strategic solutions grounded in nonprofit strategy, innovation, human capital development, and performance measurement. The literature spans peer-reviewed journals, practitioner reports, and seminal theories related to nonprofit leadership, strategic planning, innovation management, and workforce strategies, with an emphasis on applicability to small and mid-sized organizations. This synthesis also integrates Canadian sector-specific data and global best practices to ensure recommendations are contextually relevant and theoretically robust. Together, these sources inform a comprehensive consulting approach aligned with the BEF and the RBV, offering a dual framework for aligning internal capacities with measurable, mission-driven outcomes.

Strategic Leadership and Succession Planning

Leadership succession is one of the most persistent challenges for Canadian nonprofits, particularly in small and mid-sized organizations constrained by limited resources and reliant on long-serving leaders. Research showed that leadership transitions conducted without proactive planning can cause operational disruptions, mission drift, and reduced stakeholder confidence (Geib & Boenigk, 2022; Siambi, 2022). Siambi

(2022) found that many nonprofits adopt a reactive approach to succession, which contributes to service interruptions and morale decline, especially in organizations where institutional knowledge is concentrated among a few individuals. These findings underscore that leadership continuity functions as a strategic capability rather than a routine governance requirement.

From the RBV perspective, leadership capabilities that promote continuity and knowledge transfer constitute valuable, rare, and difficult-to-replicate assets that strengthen organizational performance (Penrose, 1959; 1995). The BEF reinforces this view through leadership system criteria that emphasize workforce development, alignment with organizational purpose, and continuous performance improvement (Baldrige Performance Excellence Program, 2023). Collectively, the literature suggests that succession planning should be understood as a strategic process that builds organizational resilience and positions nonprofits for enduring continuity, which provides a transition to broader discussions on workforce engagement and retention.

Workforce Engagement and Volunteer Retention

Workforce engagement, which includes both paid staff and volunteers, remained central to nonprofit stability yet was underdeveloped in many Canadian organizations. The ONN's (2025a) Cost of Undercompensation report found that low wages, limited benefits, and rising workloads contributed to persistent attrition, particularly in equity-seeking organizations. Volunteer retention faced similar pressures, with 61% of B3 nonprofits reporting difficulty maintaining volunteer involvement post-pandemic (ONN, 2025b). These trends were especially detrimental in organizations that relied heavily on

part-time staff or volunteers for service delivery. Together, this evidence showed that workforce challenges directly affected an organization's ability to maintain consistent programming and foster community trust.

Strategic planning models offered several pathways to strengthen workforce engagement and address these challenges. Locke and Fritschle's (2022) nonprofit portfolio strategy integrated differentiated engagement approaches for staff and volunteers and emphasized continuous feedback mechanisms to align individual contributions with organizational goals. This perspective aligned with the RBV by positioning engaged human capital as a strategic asset that supported mission delivery. Seo et al. (2026) extended this understanding by demonstrating that nonprofits that balanced structured engagement systems with adaptive practices, such as hybrid work arrangements, achieved stronger retention and organizational resilience. The BEF supported these findings through its workforce category, which emphasized capability, well-being, and alignment with strategic priorities (Baldrige Performance Excellence Program, 2023). Collectively, this scholarship indicated that engagement functioned as a strategic driver. Integrating engagement metrics into performance management systems could strengthen learning, improve retention, and enhance mission impact. This conclusion provides a transition to the next topic, which examines the role of performance measurement and continuous improvement in nonprofit effectiveness.

Performance Measurement Systems

Performance measurement was increasingly recognized as a strategic asset in nonprofit management, marking a shift from compliance-driven reporting to an essential

management function. Moura et al. (2022) found that many nonprofits lack integrated systems that link performance metrics to strategic planning, leading to fragmented data and underutilized insights. This gap was particularly pronounced in small Canadian nonprofits where evaluation capacity and technological resources were limited. Without cohesive systems, organizations risked misaligning resource allocation, failing to capture meaningful impact, and overlooking opportunities for continuous improvement. These limitations underscored the need for scalable approaches that embedded performance measurement into routine operations rather than treating it as an externally motivated or periodic exercise.

The BEF's measurement, analysis, and knowledge management category provided a systems-based method for embedding data use into decision-making and continuous improvement processes (Baldrige Performance Excellence Program, 2023). Alanazi (2025) demonstrated that adopting the Baldrige approach improved organizational coherence by aligning qualitative and quantitative indicators with mission-relevant goals. Baig et al. (2025) argued that performance measurement capability constituted organizational capital within the RBV because it was difficult to imitate and essential for strategic advantage. Seo et al. (2026) supported this integration by showing that systems designed for both routine evaluation and adaptive learning enabled nonprofits to respond to evolving community needs while maintaining accountability. Collectively, this evidence suggested that embedding performance systems aligned with the Baldrige Framework and the resource-based perspective could enhance decision-making, strengthen stakeholder trust, and position nonprofits for durable impact in

resource-constrained environments. This conclusion transitions to the next topic, which examines how revenue diversification and innovation strategies support organizational capacity and financial stability.

Revenue Diversification and Innovation Strategies

Revenue diversification is a strategic imperative for nonprofit resilience, particularly for organizations vulnerable to funding volatility. Hoang et al. (2024) found that nonprofits with multiple income streams, such as grants, donations, and earned revenue, were better positioned to navigate the disruptions of the COVID-19 pandemic. In contrast, organizations dependent on a single funding source faced heightened operational risk, including service cuts and staff layoffs. Revenue diversity also enables nonprofits to invest in capacity building, technology adoption, and workforce retention—areas critical to long-term impact (Nardini et al., 2022).

Innovation is closely tied to financial resilience. Seo et al. (2026) demonstrated that nonprofits adopting ambidextrous strategies, which balance operational stability with innovation, are better able to adapt to shifting stakeholder expectations. Locke and Fritschle's (2022) portfolio model supported this approach by framing programs, partnerships, and revenue sources as interconnected assets with varying risk profiles. From the BEF perspective, the strategic planning and operations categories encourage aligning resource allocation with mission outcomes, fostering both financial sustainability and adaptive capacity (Baldrige Performance Excellence Program, 2023). Furthermore, integrating innovation metrics into strategic planning can help nonprofits systematically

evaluate the return on new initiatives, ensuring that experimentation strengthens rather than undermines core mission delivery (Seo et al., 2026).

Digital Transformation and Capacity Building

Digital transformation is a critical enabler of nonprofit capacity building, yet adoption remains uneven across the Canadian sector. Nikita et al. (2024) highlighted that successful digital transformation requires not only technology acquisition but also organizational restructuring, leadership commitment, and cultural alignment. However, the ONN (2024) reported that smaller nonprofits face barriers, including outdated systems, insufficient funding, and limited digital literacy among staff and volunteers. These constraints can hinder the ability to meet evolving stakeholder expectations, particularly in hybrid or remote service delivery contexts (Seo et al., 2026).

Ávila et al. (2024) positioned digital competencies as core internal capabilities within the RBV framework, enabling organizations to improve agility, data use, and stakeholder engagement. The BEF reinforced this by embedding technology use into its workforce and operations categories, ensuring alignment with performance goals (Baldrige Performance Excellence Program, 2023). Seo et al. (2026) advocated for ambidextrous approaches to digital adoption, combining structured planning with adaptive experimentation to accommodate varied readiness levels. This included incremental implementation, peer learning networks, and iterative feedback loops that allowed nonprofits to scale solutions effectively. When integrated into broader organizational planning, such strategies could expand service access, improve efficiency, and strengthen enduring organizational stability while maintaining mission focus.

Implications for Social Change and Professional Practice

The insights derived from this integrative review carried important implications for both professional practice and broader social change within the Canadian nonprofit sector. As organizations face increasing pressure to deliver stable services amid funding volatility, demographic shifts, and evolving digital demands, the need for integrated, evidence-based strategies becomes more urgent (Alanazi, 2025; Hoang et al., 2024). Centering practices such as leadership succession planning, workforce engagement, and organizational strengthening offered nonprofit leaders structured ways to prepare for uncertainty while maintaining service continuity and public trust.

The adoption of frameworks such as the BEF supports internal operational alignment and enables mission-driven organizations to evaluate and improve performance transparently (Baldrige Performance Excellence Program, 2023). In parallel, the RBV allows leaders to identify intangible assets such as volunteer engagement, relational leadership, and adaptive capacity as contributors to strategic advantage (Ferreira & Ferreira, 2025; Penrose, 1995). When applied in practice, these approaches improve an organization's ability to meet diverse community needs, retain staff, and develop structures that support long-term impact.

Nonprofit consultants and ecosystem partners could also use these findings to design interventions that support smaller organizations with limited resources. The literature supported the use of shared leadership, consensus mapping, hybrid work models, and digital upskilling as scalable strategies that improved performance (De Clerck et al., 2024; Meyfroodt et al., 2025; Nikita et al., 2024; Seo et al., 2026). These

evidence-based tools also help expand leadership participation and empower marginalized voices within nonprofit governance and operations (Seo et al., 2026). Applying the research-based strategies contribute to positive social change by strengthening nonprofit systems, improving service availability, and supporting more inclusive leadership models.

Gaps in the Literature and Directions for Future Research

While the literature offers robust theoretical models, gaps remain in operationalizing these strategies within small to mid-sized Canadian nonprofits lacking formal HR and IT infrastructure. Ávila et al. (2024) and Meyfrootd et al. (2025) showed that advanced tools such as the BEF and consensus analytics can improve performance, yet few studies address feasibility in resource-constrained environments with limited leadership bandwidth, competing priorities, and restricted funding flexibility. Furthermore, Canadian-specific research remains limited, with insufficient attention to the regulatory, cultural, and geographic factors influencing leadership continuity and operational sustainability.

Future research should explore integrated approaches that combine succession planning, volunteer retention, and digital transformation into a single strategic continuum. Underexplored areas such as trauma-informed leadership, algorithmic ethics in volunteer engagement, and localized approaches to strengthening digital capacity represent critical frontiers for advancing nonprofit sustainability, equity, and long-term social impact (Abikova, 2024; Hesse, 2025). These strategies should be tested in diverse

Canadian contexts to identify scalable, equity-centered practices that reflect both urban and rural realities.

The literature demonstrates that Canadian nonprofits face interconnected challenges in leadership continuity, workforce retention, financial sustainability, and digital readiness, all of which directly influence operational stability and mission fulfillment. Leadership transitions without strategic alignment disrupt service continuity, while workforce attrition exacerbated by undercompensation and rising service demands limits capacity (ONN, 2025a). Financial vulnerability, particularly among organizations dependent on narrow revenue streams, restricts investment in innovation and capacity building, and post-pandemic shifts have magnified technology gaps (Hoang et al., 2024; Nikita et al., 2024). Research consistently supports the integration of leadership succession planning, workforce engagement, performance measurement, revenue diversification, and digital transformation into a unified strategy. Applying structured frameworks such as the BEF and the RBV offers a means to align internal capabilities with measurable outcomes, enhance adaptability, and strengthen community impact (Alanazi, 2025; Ávila et al., 2024). Together, these findings affirm the need for evidence-based, strategically aligned approaches to build resilience and ensure long-term organizational viability in the Canadian nonprofit sector.

Summary

This section established the foundation for the consulting case study by (a) presenting the background and specific business problem facing Canadian nonprofit leaders, operational inefficiency, instructor retention, and limited revenue diversification;

(b) stating the project purpose and qualitative single-case design focused on leaders within one client organization; (c) outlining participants, sampling, eligibility, data sources (interviews, archival and public documents, literature), and the planned analytic approach (thematic analysis with member checking, triangulation, and saturation); and (d) articulating the composite conceptual framework. The BEF provides a systems lens for aligning leadership, strategy, workforce, measurement, operations, and results, whereas the RBV focuses on the internal, mission-critical intangible assets that underpin resilience. The evidence-based integrative review synthesized recent and seminal scholarship to justify this design and framework, positioning the project to generate actionable strategies that strengthen efficiency, retention, and sustainability for the client nonprofit.

Section 2: Project Methodology

Nature of the Project

In this doctoral consulting research project, I employed a qualitative single case study design to explore strategies used by leaders of a Canadian nonprofit organization to optimize operational efficiency, enhance instructor retention, and diversify revenue streams. The qualitative approach is appropriate for understanding the meaning participants assign to real-world problems and processes within their organization (Yin, 2018). A single case study design was selected to allow for an in-depth exploration of a contemporary phenomenon within its real-life context, particularly when the boundaries between the phenomenon and context are not clearly evident (Stake, 1995; Yin, 2018). This design enabled a nuanced understanding of how organizational leaders implement strategic initiatives within a constrained nonprofit environment.

Method and Design

A qualitative method was selected because qualitative researchers capture complex organizational processes, stakeholder experiences, and contextual factors that influence strategic and operational decision-making. As Creswell and Poth (2017) explained, qualitative inquiry is appropriate when the goal is to explore how individuals construct meaning within specific social and organizational contexts. This approach is well aligned with the needs of nonprofit organization leader business consulting, where values, motivations, and behaviors often shape strategic outcomes.

The design used in this project was a single case study. Using a case study approach, I conducted a focused exploration of one nonprofit organization experiencing

the business challenges under review to examine strategies employed by organizational leaders to improve outcomes. This design facilitated the integration of interviews, organizational documents, and secondary reports to triangulate findings and develop actionable recommendations for the client organization. This combined method and design supports answering the research question by providing the depth, contextual understanding, and evidence triangulation needed to analyze leadership practices, strategic processes, and operational challenges within the organization.

Reliability

To ensure reliability and enhance the trustworthiness of the case study, several qualitative validation strategies were employed:

- Data saturation was achieved by conducting interviews with all key informants until no new information or themes emerged, ensuring comprehensive coverage of perspectives.
- Member checking was used to confirm the accuracy and credibility of the data. Participants were provided with interview analysis summaries to validate that their statements had been accurately captured and interpreted.
- Triangulation of data sources: interviews, internal documents, and publicly available sector reports, was conducted to cross-verify themes and enhance confirmability (see Denzin, 2017; see Patton, 2014).
- Credibility was addressed through prolonged engagement with participants and follow-up clarification as needed.
- Dependability and confirmability were maintained by creating an audit trail

documenting all research procedures, coding decisions, and reflective notes throughout the data collection and analysis process (see Marshall & Rossman, 2016).

- Transferability was strengthened through rich, thick descriptions of the organizational context, participants, and setting, allowing readers to determine the applicability of findings to similar nonprofit organizations (see Lincoln & Guba, 1985).

These strategies helped ensure the case study met the rigorous standards of qualitative research while yielding actionable findings aligned with the consulting case study's purpose.

Population, Sampling, and Participants

Population and Participant Characteristics

The population for this qualitative single case study consisted of leaders and key personnel at a Canadian nonprofit organization operating in the adult education and workforce training sector. The organization was selected as the client organization for this consulting qualitative single case study capstone project based on its engagement in the consulting process and its alignment with the project's focus on operational efficiency, instructor retention, and revenue diversification. As a consulting client, the organization provided access to leadership, personnel, and organizational data necessary to support an in-depth examination of current practices and improvement opportunities. Eligible participants included individuals in leadership, instructional, or administrative roles who were actively involved in the implementation of effective strategies to optimize

operational efficiency, enhance instructor retention, and diversify revenue streams to ensure long-term financial sustainability and positive social change within the community. Inclusion criteria required participants to have held their position for at least 6 months to ensure they possessed relevant experience and institutional knowledge aligned with the project's focus on operational efficiency, instructor retention, and revenue diversification.

The final sample included six participants (e.g., CEO and director-level roles), mid-level program managers, and instructional staff. These participants represented a diverse cross-section of the organization's operations, allowing for a comprehensive exploration of the strategies in use. This alignment with the single case study's purpose ensured that the data gathered reflected both strategic and frontline perspectives, which is critical in nonprofit environments where decision-making is often collaborative (see Creswell & Poth, 2017; Yin, 2018). This participant profile strengthened my ability to answer the research question by ensuring that insights were drawn from individuals directly responsible for both high-level strategy and day-to-day operational practices.

Participants represented a range of functional responsibilities, including strategic leadership, program oversight, and instructional delivery. Engaging participants across multiple functional roles is recommended in qualitative case study research to capture diverse perspectives on organizational processes and decision-making (Yin, 2018). Including both leadership and frontline roles strengthened the analysis by enabling examination of how strategic priorities were interpreted and implemented across levels of the organization. This role diversity ensured that the data reflected both strategic intent

and operational realities relevant to the consulting problem of operational efficiency, instructor retention, and revenue generation.

Gaining Access to Participants

Access to participants was facilitated through a formal agreement with the client organization leadership, which was selected as the focal organization for this consulting capstone research project. Approval to engage organizational members was granted by the organization's managing director, who served as the primary organizational gatekeeper for this single case study. As part of the consulting engagement, an initial meeting was conducted with organizational leadership to confirm the project's purpose and scope, ensure alignment with organizational priorities, and identify eligible participants based on the established criteria. Follow-up communication, including an informed consent form and a project summary, was provided to all prospective participants to support transparency, voluntary participation, and ethical research practices.

Building Relationships With Participants

To foster trust and establish rapport, I employed strategies consistent with best practices in qualitative fieldwork, which supported credibility by encouraging open dialogue and minimizing response bias. These included providing participants with detailed information about the purpose of the study, ensuring confidentiality, and emphasizing the value of their insights in shaping practical recommendations for the organization (see Marshall & Rossman, 2016). I maintained a consistent and professional

tone in all communications and accommodated participants' scheduling needs, which contributed to a respectful and collaborative interview environment.

Sampling Method

Purposeful sampling was used to select participants with direct knowledge and experience relevant to the purpose of this case study. Purposeful sampling is appropriate in qualitative research when the goal is to understand a phenomenon in depth by engaging individuals who are especially knowledgeable about the subject (Patton, 2014). In this single case study, I intentionally selected participants for their roles in leadership, instructional delivery, and strategic planning, functions directly related to the project's core research questions. This sampling approach ensured that data were collected from those most capable of providing insight into the organization's strategic and operational practices, strengthening the study's ability to address the research question.

Sample Size Justification

A total of six participants were selected for interviews. This sample size is consistent with qualitative single case study research, which prioritizes depth of understanding over breadth (see Yin, 2018). This number allowed for the inclusion of varied perspectives across leadership, management, and program delivery roles, supporting triangulation of findings while maintaining feasibility given the project's timeline and scope. This sample size was sufficient to generate rich, detailed insights needed to address the research question and develop evidence-based recommendations for the organization.

Data Saturation and Triangulation

Data saturation was achieved when no new themes, categories, or insights emerged from the interviews. In qualitative case study research, saturation is commonly identified when additional data collection no longer yields novel information or contributes meaningfully to theme development, indicating sufficient depth and coverage of the phenomenon under study (Guest et al., 2005; Yin, 2018). Saturation was assessed iteratively after each interview through transcript review and comparison of emerging codes to identify redundancy and confirm thematic consistency. By the sixth interview, patterns had become repetitive, indicating that additional interviews were unlikely to yield substantially new information. The use of triangulation with organizational documents and performance reports further confirmed that the data collected were comprehensive and sufficient to answer the research questions (see Guest et al., 2005). These procedures ensured that the findings were grounded in complete and reliable data, strengthening my ability to generate accurate and actionable insights.

In summary, the methodology for this business consulting single case study was carefully designed to ensure alignment with the project's purpose and to uphold qualitative research standards. A single case study approach enabled deep exploration of strategic practices within a Canadian nonprofit. Reliability and trustworthiness were ensured through data saturation, member checking, and triangulation. Purposeful sampling and a structured interview protocol supported the collection of rich, relevant data. These strategies provided a strong foundation for generating meaningful, evidence-based recommendations tailored to the client organization's needs. Collectively, these

methodological choices ensured alignment with qualitative research standards and supported the development of actionable, evidence-based recommendations for the client organization.

Data Collection Activities

Data Collection Instruments and Processes

Data collection for this consulting capstone qualitative single case study was conducted using multiple sources to support methodological triangulation. The primary data collection methods included (a) semistructured interviews with organizational leaders and key personnel and (b) review of organizational and publicly available documents. As the scholar-consultant, I served as the primary data collection instrument, consistent with qualitative research practices that emphasize researcher engagement in data interpretation and meaning making (see Creswell & Poth, 2017; Yin, 2018).

Semistructured interviews were the primary method for collecting in-depth qualitative data. This interview format allowed for consistency across participants while providing flexibility to probe emergent topics relevant to the organization's strategic and operational context. In addition to interviews, organizational documents such as the organizational profile, bylaws, internal training schedules, program documentation, and financial and operational records were provided by the client organization to support triangulation. Publicly available documents, including the organization's website, reviews, and external communications, were also reviewed to corroborate interview data.

Baldrige Excellence Framework as the Primary Data Collection Tool

The BEF served as the primary tool guiding data collection in this consulting capstone case study by providing a structured and comprehensive approach to examining organizational performance. Interview questions were intentionally aligned with relevant BEF categories and criteria to support a systematic exploration of leadership, strategy, customers, workforce, operations, and results. The BEF is widely recognized as a performance excellence model that enables organizations to assess processes, identify strengths, and uncover opportunities for improvement using an integrated systems perspective (Baldrige Performance Excellence Program, 2023). By grounding the interview protocol in this framework, data collection was both consistent across participants and focused on organizational processes directly related to performance and sustainability. This framework-driven approach is well-suited to consulting single case study research, as it facilitates the generation of actionable, evidence-based recommendations while allowing participants to describe practices and experiences in their own words (see Yin, 2018). The use of the BEF as the organizing framework, therefore, ensured alignment between data collection activities and the broader consulting objectives of the single case study.

Rationale for the Interview Protocol

An interview protocol was used to promote consistency, rigor, and alignment with the BEF throughout the data collection process. The use of an interview protocol in consulting capstone qualitative single case study research supports methodological rigor by ensuring comparability across participant responses while allowing flexibility to

explore emergent themes through follow-up questions (see Saunders et al., 2019; Yin, 2018). This structured yet adaptable approach supported depth of understanding while maintaining focus on the research purpose and consulting objectives. The interview protocol also served as a practical mechanism for managing the dual role of scholar-consultant by clearly distinguishing research data collection activities from consulting discussions, which is essential for maintaining ethical boundaries and transparency in applied doctoral research (see Creswell & Poth, 2017). Providing participants with a structured interview process reduced ambiguity, reinforced ethical research practices, and supported credible data collection. The full interview protocol is included in Appendix A of this document and is listed in the Table of Contents.

Use of the Interview Protocol and Consulting Service Agreement

Data collection activities were conducted in accordance with both the approved interview protocol and the consulting service agreement established with the client organization. The consulting service agreement defined the scope of the consulting engagement, access to organizational data, and expectations for collaboration, while the interview protocol governed the research-focused data collection process. The use of these complementary tools is consistent with Walden University's DBA Consulting Capstone Manual, which emphasized the importance of clearly distinguishing consulting activities from scholarly data collection to ensure ethical boundaries, methodological rigor, and role clarity in applied doctoral research (Walden University, n.d.). Aligning the interview protocol with the consulting service agreement ensured that data collection

remained systematic, transparent, and compliant with doctoral research standards while supporting the applied objectives of the consulting capstone.

Interviews were conducted throughout the completion of the BEF, with a focus on data gathering to ensure that participant insights informed both the assessment of organizational practices and the development of evidence-based consulting recommendations. The full set of interview questions is provided in Appendix A, which supports transparency and allows readers to trace how data collection aligned with the study's analytic framework and consulting objectives. The integration of the interview protocol with the consulting agreement ensured that data collection remained systematic, ethical, and aligned with doctoral research standards while supporting the applied nature of the consulting capstone.

Data Collection Techniques and Abridged Interview Protocol

Semistructured interviews were conducted with six participants using a predefined interview protocol aligned with the BEF. Interviews were conducted virtually via the online meeting platform Zoom to accommodate participant availability and were audio recorded with participant consent. Field notes were taken during and immediately following each interview to capture contextual observations and initial analytic reflections.

An abridged version of the interview protocol included questions such as the following:

- How does organizational leadership support strategic planning and performance improvement?

- What processes are used to support workforce engagement and instructor retention?
- How does the organization evaluate operational effectiveness and program outcomes?
- What challenges and opportunities exist related to financial sustainability and revenue diversification?

Additional documents and materials were reviewed alongside interview transcripts to support triangulation and enhance the credibility of findings. The full interview protocol, including all interview questions aligned with the BEF, is located in Appendix A of the project document. The Table of Contents reflects the inclusion of all appendices to ensure clarity and accessibility for reviewers.

Data Organization and Analysis Techniques

Data Organization Systems

Multiple systems were used to organize, manage, and track data throughout this consulting capstone qualitative single case study. Data organization strategies included the use of a research log, a reflective consulting journal, and systematic cataloging and labeling of interview records and organizational documents. The use of multiple, structured data management systems is recommended in qualitative case study research to enhance transparency, support auditability, and strengthen analytic rigor by allowing researchers to trace emerging interpretations back to original data sources (Creswell & Poth, 2017; Yin, 2018). By maintaining organized records across interviews, documents, and reflective notes, the study ensured that emerging understandings were systematically

documented and could be reviewed, compared, and validated throughout the data analysis process.

A research log was maintained to document all data collection activities, including dates of Zoom-based semistructured interviews, meeting participants, purposes of each interaction, and initial analytic observations. The research log also captured decisions related to data analysis and reflections on emerging patterns. In addition, a reflective journal was used to document insights generated during consulting engagements, evolving interpretations, and the scholar-consultant's reflexive observations. Maintaining a reflective journal is a recommended practice in qualitative research to enhance rigor and reduce bias by explicitly acknowledging the researcher's role in data interpretation (Creswell & Poth, 2017). Together, the research log and reflective journal strengthened the credibility of the analysis by making analytic decisions transparent and ensuring that interpretations remained grounded in documented evidence relevant to the consulting problem and project purpose.

All interview notes, meeting summaries, and organizational documents were cataloged and labeled by data source, date, and BEF category. This systematic labeling supported efficient retrieval and cross-comparison of data during analysis and facilitated triangulation across multiple sources. By organizing data according to Baldrige categories, the analysis remained aligned with the study's conceptual framework and facilitated the identification of convergent and divergent evidence relevant to the consulting problem.

Data Analysis Process and Triangulation Strategy

This qualitative single case study employed Yin's (2018) thematic analysis approach in combination with methodological triangulation as the primary data analysis strategy to ensure analytic rigor and credibility. Methodological triangulation involves examining a phenomenon through multiple data sources to strengthen credibility and confirm patterns across evidence (Yin, 2018). This approach is particularly appropriate for consulting-oriented case studies, where interviews, organizational documents, and reflective journals are integrated to develop a comprehensive understanding of organizational performance.

In this single case study, triangulation was achieved by comparing data from semistructured Zoom interviews, organizational documents provided by the client organization, and the consulting communication journal. Using methodological triangulation reduced reliance on a single data source and enhanced the trustworthiness of findings (Saunders et al., 2019). Data were analyzed across these sources to identify convergence, consistency, and divergence related to leadership practices, strategic planning, workforce management, operational processes, and performance results.

Sequential Data Analysis Procedures

Data analysis followed a logical, sequential process consistent with the qualitative single case study methodology. First, interview notes and meeting summaries were reviewed alongside journal entries and organizational documents to gain familiarity with the data. During this phase, initial impressions and observations were documented in the research log to support early sense-making.

Second, data were coded using an iterative process guided by the BEF.

Meaningful units of data were identified and assigned initial codes related to the BEF categories such as leadership, strategy, workforce, operations, and results. Codes were refined through constant comparison across interviews, documents, and journal entries to identify recurring patterns and relationships.

Third, related codes were grouped into broader categories and themes aligned with the BEF. This step-by-step analytic process ensured that findings were grounded in the data and supported the development of evidence-based consulting recommendations (Yin, 2018). These themes represented organizational strengths, challenges, and opportunities for improvement relevant to the consulting problem. Finally, themes were reviewed across all data sources to confirm consistency and alignment with the research purpose. This combined use of thematic analysis and methodological triangulation ensured that findings were grounded in multiple sources of evidence and supported the development of accurate, evidence-based consulting recommendations.

Conceptual Analytic Plan and Software

A structured, manual qualitative analytic approach supported by Microsoft Excel was used as the conceptual plan for coding, mind-mapping, and theme development. Excel served as an integrated analytic tool for maintaining the research log, organizing coded data, mapping relationships among themes, and cataloging organizational documents. Rather than relying on automated qualitative analysis software, Excel was selected to support close engagement with the data and transparent analytic decision-making.

Interview notes, document excerpts, and journal reflections were entered into Excel-based matrices aligned with BEF categories. Using Excel in this manner supported an auditable analytic trail while allowing flexibility to integrate both scholarly analysis and consulting insights, which is appropriate for a qualitative single-case consulting capstone study (see Saunders et al., 2019). This matrix-based approach enabled comparisons across participants and data sources, supported the iterative refinement of codes, and facilitated the visual mapping of emerging themes.

Data Security and Retention

All raw data, including interview notes, Zoom meeting summaries, reflective journal entries, and organizational documents, were stored securely on a password-protected device accessible only to the scholar-consultant. These procedures ensured confidentiality, data integrity, and compliance with doctoral research standards (Walden University, n.d.). These data security and retention practices ensured ethical compliance while safeguarding participant information and supporting the credibility and integrity of the research findings. In accordance with Walden University's ethical guidelines and IRB requirements, all raw data will be retained for a minimum of 5 years and then permanently destroyed.

Summary

Section 2 described the methodological approach used for this consulting capstone qualitative single case study and explained the procedures implemented to ensure rigor, credibility, and alignment with the project's purpose. A qualitative single case study design supported an in-depth exploration of strategies used by leaders of a

Canadian nonprofit organization to improve operational efficiency, enhance instructor retention, and diversify revenue streams. Purposeful sampling and semistructured interviews enabled the collection of rich, role-relevant data, which were triangulated with organizational documents and reflective records. Systematic data organization, a structured thematic analysis guided by characteristics of interview questions based on the BEF, and methodological triangulation strengthened the trustworthiness of the findings. Collectively, these methodological decisions provided a sound foundation for generating evidence-based insights and actionable recommendations tailored to the needs of the client organization.

Section 3: Data and Professional Practice

The purpose of this qualitative consulting single case study was to analyze how the TSO designed, managed, and improved its leadership, workforce, operations, and performance systems to support mission fulfillment and organizational effectiveness. The analysis revealed four overarching themes. First, the TSO demonstrated strong mission alignment, reliable service delivery, and high levels of stakeholder trust across training and community response activities. Second, core processes operated effectively but remained informal, undocumented, and dependent on tacit knowledge rather than standardized systems. Third, workforce and governance structures demonstrated commitment and stability but faced persistent challenges in communication, onboarding, recognition, and role clarity. Finally, the results indicated consistent but modest progress across instructional performance, financial stability, and strategic execution, with the most significant opportunities found in measurement infrastructure, outcome evaluation, and board governance. Together, these themes provided the foundation for evaluating organizational performance through the BEF and identifying evidence-based opportunities for improvement.

Organization Profile

Organizational Description

TSO operates as a nonprofit entity that provides essential services to the community, including first aid and CPR training and emergency medical response. TSO has become one of the leading organizations in Canada dedicated to improving public health and safety through education and volunteer service. TSO's mission is to provide

training that empowers individuals to save lives and improve their communities' health and safety while maintaining a high standard of medical response through volunteerism and professional services.

Organizational Environment

Product Offerings. TSO's core services include first aid and CPR training, serving various clients such as businesses, schools, and community members. The organization also provides medical response services, including volunteer-based programs such as therapy dog visitation. The majority of revenue comes from delivering in-house and external training services. Services, such as those provided by TSO, are crucial to meeting community needs, with specialized training sessions offered for niche groups, such as babysitters.

Mission, Vision, and Values. The mission of TSO is to enhance health, safety, and well-being by offering training, education, and emergency medical services. The vision is to be the foremost provider of life-saving skills across Canada, ensuring everyone has access to vital training. Core values include community engagement, accessibility, and a commitment to excellence in both educational and medical services. Principles, such as these, guide the organization's daily operations and strategic initiatives.

Workforce Profile. TSO's workforce includes a combination of full-time, part-time, and contract staff and a large volunteer base. The core team consists of nine full-time employees and 10 part-time instructors, supplemented by approximately 200 volunteers. As with other similar organizations, contract instructors are employed as

needed to meet training demands (see Celestin, 2024). Volunteers are essential to the successful delivery of TSO's services, particularly in community-based activities.

The organization's current workforce structure presents ongoing challenges that affect instructional capacity and operational reliability. Most instructors serve as independent contractors, which makes it difficult to maintain consistent staffing and contributes to recurring gaps in course coverage. Leadership, particularly the manager of learning, is implementing targeted recruitment efforts to address these issues, including hiring French-speaking instructors to meet community language needs. Instructors also face workload pressures because many course assignments occur with limited notice, creating strain and reducing predictability. Research noted that nonprofits experiencing similar constraints often strengthen stability by adding part-time roles or blended contract positions to expand flexibility and reduce turnover (Celestin, 2024; Faletahan, 2022). These patterns indicate that while TSO's instructional workforce remains committed, the current structure limits long-term workforce sustainability and constrains the organization's ability to scale its training services effectively.

Assets. TSO's key assets include a fully equipped training facility that functions as the foundation for its instructional and community service activities. The facility supports the delivery of diverse training programs and enables the organization to host community events, while the network of trained instructors enhances the scalability and reach of these services. Evidence from nonprofit operations research noted that organizations with strong physical and human assets are better positioned to expand programming and respond to community needs (Nordin et al., 2022). These conditions

suggest that TSO's facility and instructional workforce provide an essential operational advantage, although maximizing their value will require complementary improvements in workforce systems, scheduling processes, and program coordination.

Regulatory Requirements. Regulatory requirements at the TSO operate as a structured system that guides compliance, workforce expectations, and service quality. TSO adheres to nationally governed standards for medical response, training curriculum, instructor credentialing, and program accreditation, ensuring alignment with national safety requirements. These standards define the approach and establish regulated procedures for course content, instructor evaluation, and emergency response expectations. Deployment occurs through the national office's oversight of instructor certification processes and mandated compliance checks at the regional level. Provincial requirements related to workplace safety and medical-response protocols also shape TSO's operational environment, reflecting broader nonprofit workforce expectations in similar organizations (see Faletahan, 2022). Although these compliance processes are in place, the current model offers limited opportunities for organizational learning, as improvements largely depend on national guidance rather than locally generated performance reviews or risk assessments. Integrating regulatory requirements into a more iterative internal process, such as applying the Plan-Do-Check-Act cycle to monitor instructor credentialing, training quality, and safety compliance, would strengthen alignment across TSO's leadership, workforce, and operational systems. This integration would also support stronger evaluation mechanisms that reduce variability across training sites and advance the organization toward more systematic performance excellence.

These regulatory expectations underpin the broader organizational profile by shaping how TSO manages risk, develops its workforce, and ensures the delivery of safe, high-quality services, creating the foundation for subsequent BEF category analyses.

Organizational Relationships

Organizational Structure. Effective nonprofit governance typically includes a layered structure that separates strategic oversight from operational management. In practice, this often involves a board of directors or a governing council that guides long-term strategy, while executive leadership manages daily operations. This leadership team collaborates with both staff and volunteers to ensure alignment with mission-driven goals and service delivery priorities (see Gandrita, 2023). For example, a common model includes a CEO who reports to the board and contributes to broader organizational strategy, while a managing director or similar role oversees functional departments such as community services, training, emergency management, and logistics.

TSO's leadership is actively reviewing and updating job descriptions to ensure that organizational roles reflect current operational needs and emerging service demands. Recent adjustments include redefining the manager of learning position, which previously combined training and community services, allowing the role to focus exclusively on training. The introduction of a community services coordinator further illustrates the organization's effort to distribute responsibilities more effectively and to strengthen its capacity across both service areas. Research showed that revising structures and clarifying role boundaries can improve coordination and efficiency in nonprofits experiencing increased service demand (Gandrita, 2023). These developments indicate

that TSO is moving toward a more intentional organizational structure, one that better supports workload balance, improves role clarity, and positions the organization to manage growth more effectively as service expectations continue to expand.

Customers and Stakeholders. TSO serves a diverse customer base that includes individuals, educational institutions, businesses, and government agencies. Renz et al. (2022) emphasized that effective stakeholder engagement in nonprofit organizations directly influences both financial viability and mission-related outcomes, highlighting the critical role these stakeholders play in shaping organizational impact. TSO operations depend heavily on the engagement of key stakeholders, including local and national governments, health authorities, and a robust network of volunteers supporting service delivery.

Suppliers and Partners. TSO's supplier and partner relationships function as structured mechanisms that expand service capacity and reinforce operational effectiveness. TSO partners with medical professionals, health organizations, and community groups to support the delivery of high-quality first aid training and medical response programs. These collaborations establish the approach by defining shared expectations for resource provision, instructional support, and community service engagement. Deployment is evident in TSO's regular use of these partners to deliver training sessions, coordinate community events, and supplement volunteer-driven programs. Additional partnerships with nonprofit organizations and government agencies broaden the organization's reach and strengthen service continuity, aligning with evidence that nonprofit sector resilience depends on collaborative capacity and

coordinated resource networks (Shields et al., 2024). These relationships provide learning opportunities, particularly when feedback from partners reveals service gaps, training needs, or changing community conditions. This feedback can be incorporated into planning cycles to refine processes and enhance volunteer readiness. Integration occurs as supplier and partner insights inform training operations, community programs, and strategic decisions, creating alignment across TSO's service functions. Together, these collaborative structures reinforce TSO's operational capacity and provide essential inputs for continuous improvement activities that support Baldrige Category 6 and later results evaluations.

Organizational Situation

Competitive Environment

TSO operates in a competitive environment, particularly within the area of first aid and CPR training. Competitors include nonprofit and for-profit organizations offering similar services, as well as government health agencies. However, TSO's longstanding presence, broad service offerings, and community engagement provide it with a competitive edge in the marketplace (see Martin & Olson, 2023).

Competitive Position. TSO holds a strong market position within its regional context, supported by a longstanding reputation for quality training and community partnerships. However, the organization faced challenges in balancing rising demand for services with a limited instructor base, creating operational strain and capacity concerns. According to Nikita et al. (2024), small and mid-sized organizations in the Canadian education and training sector frequently struggle to scale due to constraints in workforce

availability and resource management. This evidence reflected the organization's current reality, where competition from lower-cost training providers, particularly those with fewer regulatory standards, posed a continual challenge. The organization's ability to maintain a competitive advantage depended not only on its reputation but also on its capacity to innovate, manage staffing shortages, and align strategic priorities with its mission objectives.

Competitiveness Changes. TSO has experienced several shifts in its competitive environment, particularly since the COVID-19 pandemic accelerated changes in digital training delivery. Competitors offering fully online or hybrid first aid certification programs have increased their market share, especially among cost-sensitive clients. This has placed pressure on TSO to adapt its instructional model while maintaining the rigor and quality mandated by national standards. Additionally, customer expectations have shifted toward more flexible, on-demand learning formats, requiring TSO to reevaluate its program delivery and invest in digital infrastructure. According to Shields et al. (2024), nonprofits that adapt quickly to external changes by incorporating technology and refining service delivery gain a strategic advantage. TSO's leadership recognizes the need to remain competitive by modernizing instructional methods, expanding instructor capacity, and diversifying service offerings to meet evolving demands.

Comparative Data. Although precise industry benchmarks vary by province, available data from Canadian nonprofit training providers suggest that TSO performs well in terms of service reach and volunteer engagement. For example, the average size of volunteer networks in similarly scoped organizations ranges from 100 to 150

individuals, whereas TSO maintains an active pool of approximately 200 volunteers (see Celestin, 2024). However, TSO lags slightly behind in instructor retention, with turnover among contract instructors noted as a persistent challenge. In terms of course delivery, TSO has consistently met its program delivery targets, but recent surges in demand have strained staffing capacity. According to Nordin et al. (2022), organizations with stable instructional teams are more likely to scale operations sustainably. Comparative analysis thus reinforces the importance of strategic workforce planning and process optimization, both of which are core to TSO's current improvement efforts.

Strategic Context

The organization is focused on growth, aiming to increase training revenues by 50% within the next year and a half, with plans to further expand course offerings in response to growing demand. This includes developing new programs such as wilderness and remote first aid courses, and mental health and wellness training. The organization is also exploring potential investments in technology and marketing strategies, including leveraging social media to drive course registrations and reach a broader customer base. Efforts to increase training business growth are also linked to the ongoing need to improve instructor recruitment and retention, particularly in specialized areas such as French-speaking instructors (Berenguer et al., 2024; Piatak & Carman, 2023). To support these goals, the leadership team is considering hiring additional staff, such as part-time instructors and a contract person for recruitment and promotions.

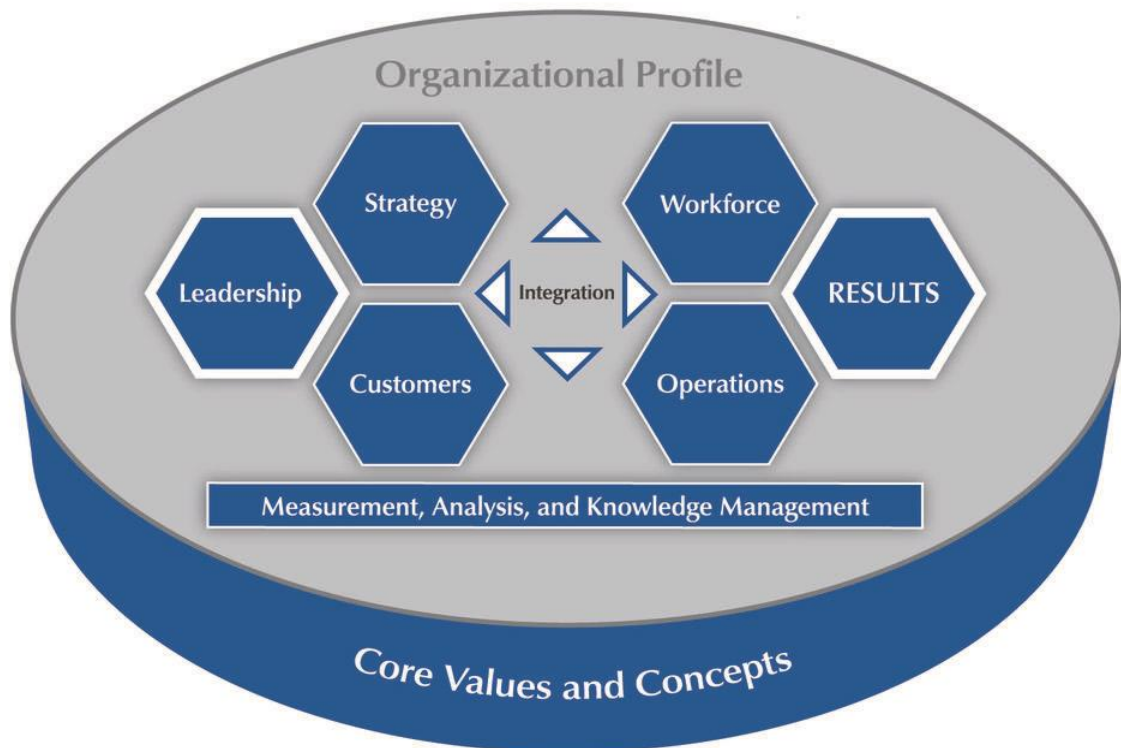
Performance Improvement System

The organization's performance improvement system was in a stage of refinement, particularly regarding how instructor effectiveness and training outcomes were evaluated. The existing D365 database was being reviewed for limitations, with discussions underway about incorporating advanced analytics tools, including artificial intelligence, to strengthen data mining and reporting capabilities. One senior leader expressed concerns about the potential cost of system upgrades but acknowledged the importance of improving how the organization tracks course registrations, training metrics, and instructor performance. These refinements were essential to achieving growth targets and ensuring that services remained aligned with evolving community and stakeholder needs (Nordin et al., 2022; Oliveira et al., 2021). A more integrated performance system would also enhance strategic decision-making and support evidence-based improvements across other organizational functions, creating a foundation for continuous learning and operational resilience.

Leadership Triad: Leadership, Strategy, and Customers

The Leadership Triad within the BEF illustrates the interdependence of leadership, strategy, and customer focus in achieving organizational excellence and mission impact (see Figure 1). These three categories collectively form the foundation for performance excellence by ensuring that vision, planning, and stakeholder value are mutually reinforcing. In nonprofit organizations, leadership establishes the ethical framework and mission clarity that guide strategic planning, which in turn converts vision into actionable and measurable objectives. Customer focus, defined as

understanding and meeting the needs of clients, volunteers, donors, and community partners, ensures that outcomes reflect both service quality and societal value. When applied together, these dimensions operationalize the Baldrige principle of integration, where leadership decisions directly influence strategy development and customer satisfaction outcomes (Baldrige Performance Excellence Program, 2023). Understanding the function of the Leadership Triad provides the foundation for analyzing how the TSO applies Category 1, Leadership, to strengthen governance, workforce engagement, and community impact, as explored in the next section.

Figure 1*Baldrige Performance Excellence Framework*

From Baldrige Performance Excellence Program. 2023. *2023–2024 Baldrige Excellence Framework®: Proven Leadership and Management Practices for High Performance*. Gaithersburg, MD: U.S. Department of Commerce, National Institute of Standards and Technology. <https://www.nist.gov/baldrige>.

Note. Adapted from *2023–2024 Baldrige Excellence Framework®: Proven Leadership and Management Practices for High Performance*, by Baldrige Performance Excellence Program, 2023, U.S. Department of Commerce, National Institute of Standards and Technology (<https://www.nist.gov/baldrige>). In the public domain.

For the TSO, these three dimensions are highly interdependent. Leadership provides the anchor for operational discipline, workforce engagement, and public service outcomes, which define TSO's purpose of improving community health and safety through first aid training and volunteer service. The interdependence of leadership, strategy, and customer focus illustrates how mission clarity and stakeholder need shape organizational priorities and influence performance outcomes across the system. The evidence gathered from interviews and internal documents shows that TSO's leaders rely heavily on relationships, morale, and community expectations to guide decisions, which aligns with research indicating that nonprofit leadership effectiveness is closely tied to perceived mission alignment and internal cohesion (Maier et al., 2024; Meyfroidt et al., 2025). This pattern also reflects Murataliyevna's (2025) observation that nonprofits often operate with diffuse governance structures that require leaders to integrate stakeholder expectations into daily decision making.

The analysis of this leadership component highlights how TSO's approach and deployment practices establish an ethical and people-centered foundation, while learning and integration processes remain in early stages. This emerging structure relates directly to theme identification in the results chapter, particularly the themes of informal leadership systems, limited performance measurement, and reliance on relational management practices. These findings show that leadership processes currently provide stability and commitment but lack systematic mechanisms for tracking progress or evaluating outcomes. Linking this interpretation back to the overall results, the organization's leadership approach explains why volunteer engagement, governance

consistency, and performance monitoring surfaced as key organizational needs.

Strengthening leadership systems through more formalized learning cycles and integrated performance measures would support improvement in later Baldrige categories and advance TSO toward a more mature and cohesive excellence model.

Leadership

Leadership is one of three core components of the BEF’s Leadership Triad, which also includes strategy and customers (Baldrige Performance Excellence Program, 2023). The triad emphasizes how leaders establish vision, values, and mission; how they govern the organization; and how they contribute to the broader community. The central questions guiding this section are the following: (a) How do senior leaders lead the organization? and (b) How do the organization’s leaders govern the organization and make societal contributions? (Baldrige Performance Excellence Program, 2023; see Table 1). This section explores TSO’s leadership through its senior leadership, governance, and societal contributions, providing a detailed analysis of how the organization’s leaders embody ethical conduct, promote workforce engagement, and strengthen the organization’s public mission.

Table 1

Baldrige Excellence Framework’s Leadership Triad: Leadership

Section	Main questions
1.1 Senior Leadership	“How do senior leaders lead the organization?” (Baldrige Performance Excellence Program, 2023)
1.2 Governance and Societal Contributions	“How do you govern your organization and make societal contributions?” (Baldrige Performance Excellence Program, 2023)

Senior Leadership

The TSO operates under a Board of Directors composed of a chair, vice chair, treasurer, secretary, and several members representing diverse professional backgrounds. Current board members include individuals with experience in public safety, healthcare, emergency management, education, and nonprofit administration. The organization's executive leadership includes a chief executive officer, a managing director, and a manager of learning who oversee daily operations and reports directly to the board. This multidisciplinary composition ensures that governance decisions are informed by professional expertise, ethical standards, and community needs, consistent with Baldrige principles of accountability and leadership excellence (Baldrige Performance Excellence Program, 2023; see Figure 2).

Senior leadership in the TSO demonstrates a strong commitment to advancing the organization's mission and values, establishing a solid foundation for service delivery and community engagement. Evidence from leadership interviews showed that decision-making is guided by mission relevance and service reliability, yet leadership effectiveness is also shaped by the interplay between national direction, local autonomy, and workforce motivation, a pattern commonly observed in nonprofit systems (Maier et al., 2024). These structural dynamics create communication gaps and inconsistencies in strategic alignment, as leaders must balance organizational expectations with limited administrative capacity. These conditions suggest that while TSO's leadership strengths support operational stability, addressing communication practices and role clarity will be

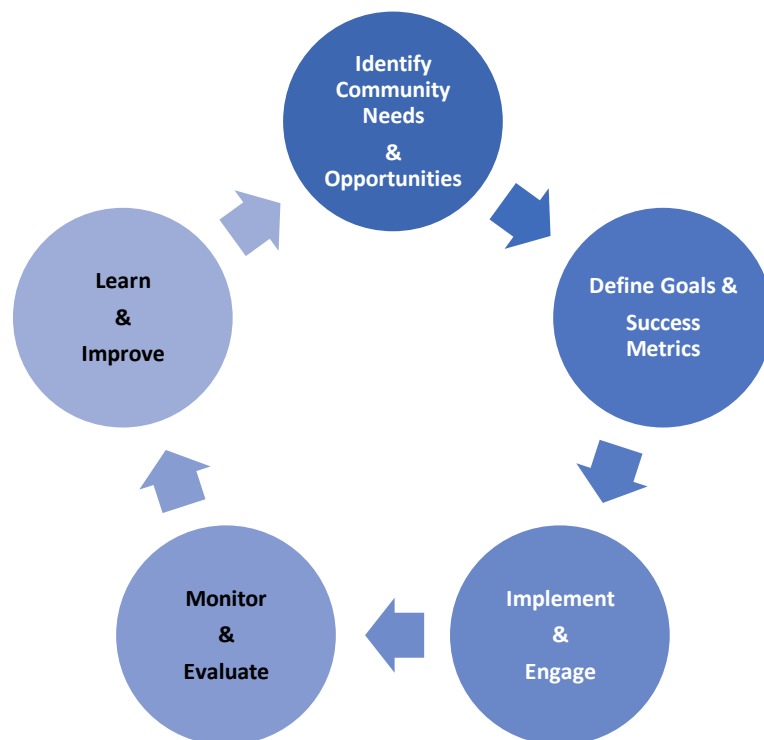
essential for achieving stronger alignment between mission priorities and long-term strategic goals.

According to the manager of learning, the organization's mission is well understood, yet communication of strategic intent is inconsistent. National headquarters develops an overarching plan, which regional councils adapt locally. At TSO, leaders struggle to translate this plan into actionable priorities: "Beyond the daily grind, it's hard to get folks to see potential new priorities." This highlights a gap between national guidance and local execution, consistent with Murataliyevna's (2025) finding that many nonprofits struggle to connect strategic leadership to operational performance due to diffuse governance structures.

In practice, senior leaders rely on informal metrics such as financial stability and course enrollment to gauge success. "As long as we are in the black, the board is more than happy to leave well enough alone," noted one leader. This reflects a maintenance orientation rather than continuous improvement, echoing Ravi et al. (2025), who observed that leadership attention in social enterprises often centers on survival metrics over developmental outcomes. Such reliance on basic financial indicators underscores a reactive rather than proactive approach to performance, limiting the organization's ability to track qualitative outcomes such as employee engagement, innovation, or community impact. However, within these constraints, TSO's leadership demonstrates adaptability through a people-centered management approach that emphasizes morale and retention. Recognition systems reflect the dual workforce of volunteers and paid instructors—volunteers receive medals and honors, while staff are motivated through flexibility,

outings, and symbolic gestures of appreciation. The leader emphasized that “maintaining a positive workspace is essential” because compensation is modest. This approach suggests that while formalized performance systems are underdeveloped, leadership compensates through relational engagement strategies that promote trust and cohesion. This aligns with Maier et al. (2024), who found that nonprofit leaders often define success not only through outputs but also through morale and mission alignment. Collectively, this evidence illustrates that TSO’s leadership, though lacking structured performance measures, sustains organizational commitment through informal but effective engagement practices, providing a foundation for developing more systematic evaluation frameworks in future planning cycles.

Viewed through the BEF’s four process evaluation dimensions, approach, deployment, learning, and integration, TSO’s senior-leadership approach shows strong ethical intent and community focus, but lacks formal processes for cascading vision and strategy. Deployment is partial and relies on informal communication. Learning is emerging through weekly CEO meetings and the planned use of 360-degree feedback. Integration remains limited but will advance with the 2026 strategic plan. Overall, leadership provides a strong ethical foundation, yet adopting measurable goals and feedback systems, such as a customized balanced scorecard (Nicolaescu & Cărămidaru, 2025), would enhance alignment and move TSO toward performance excellence.

Figure 2*Training Safety Organization's Leadership and Governance System*

Note. This figure illustrates TSO's cyclical approach to identifying needs, setting goals, implementing activities, and reviewing progress.

Governance and Societal Contributions

Governance and societal responsibility at the TSO are evolving toward greater transparency and accountability, yet formal oversight systems remain limited.

Murataliyevna (2025) observed that fragmented governance and weak internal controls are among the most persistent challenges facing nonprofits worldwide, patterns that are reflected at TSO. Leadership demonstrates strong ethical awareness and community commitment, but the absence of standardized governance processes constrains TSO's ability to sustain excellence.

The organization's governance structure prioritizes regulatory compliance over strategic accountability. Staff complete Enhanced Reliability Checks upon hiring, and volunteers undergo police clearances every three years, but annual attestations and board evaluations are inconsistent. Although board members disclose conflicts of interest before meetings, there is limited follow-through or performance review. These practices indicate partial process deployment and a reliance on trust-based governance. However, TSO recently added two new board members with expertise in change management and process improvement, signaling progress toward what the BEF defines as mature processes. Similarly, Maier et al. (2024) found that modern nonprofit leaders increasingly blend ethical stewardship with operational performance to achieve governance maturity.

TSO's societal contributions remain robust and mission driven. The organization is finalizing a Service Level Agreement (SLA) with the City to support community wellness checks and public-health monitoring. This partnership aligns TSO's training programs with municipal and national health priorities and enhances collaboration with agencies such as Public Safety Canada. According to the Manager of Learning, this partnership will position TSO to assist the fire service with wellness visits in high-rise buildings and respond to emerging public-health concerns, such as wildfire-related air-quality hazards. These efforts demonstrate the type of community responsiveness emphasized in the Baldrige criteria for organizational citizenship (Baldrige Performance Excellence Program, 2023).

TSO's volunteer and training programs also provide measurable social value by equipping thousands of community members with life-saving skills each year. These

activities align with Ravi et al. (2025), who described social enterprises that leverage human-resource development to build community resilience. Collectively, TSO's governance and societal practices reflect a transitional stage between reactive compliance and proactive stewardship.

Viewed through the BEF's four evaluation dimensions, approach, deployment, learning, and integration, TSO demonstrates early systematic progress. Its approach is guided by mission and ethics, deployment is partial but improving, learning is advancing through new board expertise and reflective leadership, and integration is emerging through alignment between governance, workforce, and community initiatives. To strengthen accountability, TSO should adopt a Plan-Do-Check-Act cycle and develop performance metrics to connect strategy with governance oversight. As Nicolaescu and Căramidaru (2025) suggested, customized balanced-scorecard tools can link strategic objectives with social outcomes, transforming governance into a driver of organizational excellence.

In conclusion, TSO's governance and societal contributions reveal an organization in transition, ethically grounded, community-centered, and ready to evolve. Embedding measurable outcomes and continuous-improvement mechanisms will advance TSO toward complete alignment under the Baldrige model, laying the foundation for the next component of the leadership triad: Strategy.

Strategy

Strategy is the second component of the BEF's Leadership Triad, following leadership and preceding customer focus (Baldrige Performance Excellence Program,

2023). The strategy category examines how an organization develops and implements plans to achieve its mission, vision, and long-term success. The Baldrige framework prompts two primary questions: (a) How do leaders develop strategy? and (b) How do leaders implement strategy? (Baldrige Performance Excellence Program, 2023; see Table 2). Answering these questions demonstrates how leadership prepares the organization for the future and aligns strategic priorities with stakeholder and community needs. This section explores how the TSO develops and implements its strategy to ensure financial sustainability, digital transformation, community impact, and operational excellence through 2030.

Table 2

Baldrige Excellence Framework’s Leadership Triad: Strategy

Section	Main questions
2.1 Strategy Development	“How do you develop your strategy?” (Baldrige Performance Excellence Program, 2023)
2.2 Strategy Implementation	“How do you implement your strategy?” (Baldrige Performance Excellence Program, 2023)

Strategy Development

TSO’s strategy development process begins with alignment to the national framework, ensuring consistency with the broader mission of community service and first-aid education. The organization then tailors national objectives to local realities in their Canadian region, engaging the Managing Director, Manager of Learning, and the Board of Directors in adapting goals that address post-pandemic recovery and operational growth. The 5-Year Strategic Business Plan (2025–2030) demonstrates an emphasis on

inclusion, innovation, and resilience, with specific priorities for financial rebuilding, volunteer retention, and community-based service expansion.

Strategic planning is informed by both internal assessment and stakeholder feedback. Leaders identify emerging opportunities, such as expanding corporate training contracts, diversifying course offerings, and formalizing Service Level Agreements (SLAs) with public agencies. As the training manager noted, the forthcoming 2026 plan will “better connect operational priorities to measurable goals,” marking a shift toward evidence-based decision-making. This process reflects the Approach and Learning dimensions of the Baldrige framework, where leadership integrates data and stakeholder input into planning cycles (Baldrige Performance Excellence Program, 2023).

The strategy documents also show growing attention to digital transformation and marketing innovation, such as the introduction of CRM and LMS systems, online registration, and analytics-driven outreach. These developments align with Nicolaescu and Cărămidaru’s (2025) recommendation that nonprofits implement balanced scorecard models to link strategic objectives with performance metrics. In addition, governance reforms, including new board training, bylaws, and dashboards, demonstrate the TSO’s intent to institutionalize strategic planning as an ongoing, participatory process.

From the Baldrige approach, deployment, learning, and integration perspective, TSO’s strategic planning approach is mission-driven and increasingly data-informed, though not yet fully formalized. Strategy development remains partially deployed, relying on leadership initiative rather than standardized cycles or cross-departmental planning sessions. Learning is evident in the organization’s iterative adjustments, as seen in its

transition from static strategic plans to adaptive, multi-year frameworks. Integration is emerging, with clearer linkages forming between financial, technological, and community goals.

Overall, TSO's strategy development demonstrates progress toward a mature, systems-oriented approach to planning. By embedding structured evaluation tools, such as a balanced scorecard and Plan-Do-Check-Act cycle, TSO can strengthen alignment between strategic priorities and measurable outcomes. This evolution positions the organization to implement its 2026 plan effectively and sustain its leadership in community health and safety education.

Strategy Implementation

The TSO implements strategy through incremental deployment of goals, programs, and systems across key operational domains. Strategy execution is guided by leadership collaboration between the Managing Director, Manager of Learning, and the Board of Directors, with oversight aligned to mission and community needs. The BEF emphasized that effective strategy implementation requires translating strategic intent into actionable plans, performance measures, and feedback mechanisms (Baldrige Performance Excellence Program, 2023). TSO's implementation process reflects a maturing organization moving from reactive management toward structured, data-driven performance.

Implementation of TSO's 2025–2030 strategic plan centers on six integrated pillars: volunteer engagement, program diversification, partnerships, operational excellence, digital transformation, and financial sustainability. Volunteer engagement

initiatives are underway, including year-round recognition programs, mentorship pathways, and flexible scheduling options to increase retention. Program diversification has progressed through the expansion of pet first aid, babysitting, and therapy dog programs, along with new partnerships to deliver CPR and mental health workshops in schools and workplaces.

Operationally, TSO is upgrading infrastructure by digitizing community service documentation, replacing classroom technology, and developing a continuity plan for off-site training. These actions support Baldrige's deployment dimension by expanding strategic actions across departments and aligning operational systems with broader objectives. Financially, TSO is pursuing cost-recovery models and corporate sponsorships while preparing for long-term grants and partnerships that ensure sustainability beyond 2026.

The organization has also begun embedding measurable performance indicators within its strategy execution process. The 2025 plan outlines specific key performance indicators, such as volunteer retention (target: 80% annually), course growth (10% year-over-year), and expanded partnership agreements (five new memoranda of understanding by 2026). These indicators align with Nicolaescu and Cărmădaru (2025) balanced scorecard approach, connecting financial, operational, and community outcomes. Leadership's intent to publish an annual impact report beginning in 2026 demonstrates a shift toward transparent performance management and stakeholder communication, an essential feature of the Baldrige learning and integration dimensions.

While progress is visible, TSO's implementation methods remain in early maturity. Deployment is strong in operational and program areas, but less formalized in governance and measurement. Learning processes are developing through leadership reviews, feedback integration, and technology adoption, but ongoing evaluation and benchmarking will be needed to sustain alignment. According to Meyfroodt et al. (2025), strategic consensus within nonprofit leadership teams strengthens execution and adaptability; TSO's emerging feedback systems and collaborative culture illustrate early steps toward that goal.

In conclusion, TSO's strategy implementation demonstrates significant progress in embedding innovation, community partnership, and measurable performance outcomes into its daily operations. Continued institutionalization of monitoring systems, such as balanced scorecards, Plan-Do-Check-Act cycles, and data dashboards, will allow the organization to evaluate success more systematically. As the next section explores, aligning customer engagement and satisfaction processes with strategic execution will further advance TSO's performance excellence within the Baldrige leadership triad.

Customers

The customer component of the Leadership Triad examines how the TSO identifies its customer groups, determines their expectations, and engages with them to build satisfaction and long term relationships. TSO serves four primary customer groups that reflect its nonprofit mission and service model. These groups include individuals and organizations purchasing first aid instruction, clients using medical response services, volunteers who receive training and developmental benefits, and external community

partners who rely on TSO’s service outcomes. These segments are outlined in Table 3.

Understanding expectations across these segments is essential because nonprofit customers assess value in ways that combine economic, relational, and trust based dimensions, a pattern reflected in current research on nonprofit customer behavior (Silvia et al., 2023). The following subsections analyze TSO’s processes for managing customer expectations and engagement using the BEF evaluation dimensions of approach, deployment, learning, and integration.

Table 3

Baldrige Excellence Framework’s Leadership Triad: Customers

Section	Main questions
3.1 Customer Expectations	“How do you listen to the voice of the customer to determine key requirements and expectations?” (Baldrige Performance Excellence Program, 2023)
3.2 Customer Engagement	“How do you build and manage customer relationships to increase satisfaction and loyalty?” (Baldrige Performance Excellence Program, 2023)

Customer Expectations

TSO’s customer expectations vary across its four customer groups, although each group shares a need for reliable service delivery, timely communication, and consistent training quality. These segments are illustrated in Table 4. Training customers, which include individuals, schools, and corporate clients, expect standardized instruction, accessible scheduling, and certification processes that meet regulatory requirements. These expectations are shaped by national training standards and the organization’s reputation for quality instruction. Medical response service customers, including event

organizers and municipal agencies, expect rapid response capability, qualified personnel, and clear service coordination. Volunteers expect skill development, recognition, and meaningful participation opportunities, which align with findings that nonprofit volunteers view psychological rewards and trust as central to their service experience (Silvia et al., 2023). External partners, such as health organizations and community agencies, expect collaboration, accurate reporting, and alignment with public health priorities. These expectations reflect broader public trust in nonprofits, particularly when stakeholders depend on them for service continuity and reliability (Silvia et al., 2023). Analyzing this evidence shows that customer expectations at TSO are partly defined by national standards but also shaped by relational trust developed at the local level. Meeting these expectations requires consistent processes and coordinated communication across training and community service units. The organization's current approach demonstrates strengths in mission alignment but also reveals gaps in deployment, particularly in timely communication and systematic identification of customer requirements. These gaps appeared in the results as themes related to inconsistent messaging, limited feedback loops, and variable responsiveness across programs. Such limitations indicate early stage learning and limited integration of customer information across departments. Understanding customer expectations clarifies why communication challenges, inconsistent processes, and limited performance measurement emerged as key opportunities for improvement. Addressing these expectations is essential for strengthening customer satisfaction outcomes in Category 7 and for aligning TSO's operational systems with stakeholder needs.

Table 4*TSO's Customer Groups and Stakeholder Segments*

TSO stakeholders	
Internal	External
<ul style="list-style-type: none"> • Volunteers • Workforce (Staff, Instructors) 	<ul style="list-style-type: none"> • Training customers • Medical response clients • Community partners (nonprofits, agencies) • Municipal and contractual partners

Note. This table summarizes the internal and external customer groups and stakeholder segments that inform TSO's service delivery and engagement processes.

Customer Engagement

TSO uses several engagement processes to build relationships with training customers, medical response clients, volunteers, and external partners, although these processes vary in maturity and consistency. Engagement with training customers occurs through course registration platforms, instructor interactions, and post training support. Medical response clients engage through service agreements, pre event planning, and on site coordination. Volunteer engagement processes include onboarding, orientation sessions, recognition events, and scheduling support. Research on nonprofit engagement confirms that volunteer satisfaction and retention improve when organizations provide clear communication and supportive relational environments (Piatak & Carman, 2023). External partners engage through collaborative initiatives, service agreements, and shared reporting requirements, which reflect the importance of cross sector coordination in nonprofit service delivery (Shields et al., 2024). Analyzing these processes indicates that TSO's approach is relationship centered, which strengthens trust and customer loyalty. However, deployment is uneven because engagement practices vary by program area and

lack standardized procedures. Learning occurs informally through leadership observations and customer comments rather than through structured feedback systems. These patterns mirror earlier findings that TSO relies on implicit norms and relational management rather than formal engagement strategies. Integration is limited because customer insights are not consistently shared across units, which restricts the organization's ability to detect trends or respond to emerging needs. These engagement patterns help explain Category 7 results that reflect inconsistent customer satisfaction metrics and limited comparative data. Strengthening engagement systems will support improvements in communication, responsiveness, and alignment with customer expectations, which are essential components of a more mature customer focus within the BEF model.

Measurement, Analysis, and Knowledge Management

Measurement, analysis, and knowledge management processes provide the foundation for how TSO evaluates organizational performance and uses information to guide decisions. Baldrige Category 4 emphasized the importance of systematic performance measurement, effective use of data, and the management of knowledge assets to ensure reliable operations, informed planning, and evidence-based improvement (Baldrige Performance Excellence Program, 2023). These functions support the organization's ability to monitor results, identify trends, and integrate information across units. Table 5 outlined the primary questions guiding this category. For TSO, these processes are significant because the organization relies heavily on financial performance indicators, digital information systems, and informal knowledge-sharing practices to

sustain effectiveness. Understanding how these systems operate provides essential context for evaluating organizational performance and alignment with the BEF. The following subsections examine TSO’s current measurement and knowledge management practices using the Baldrige evaluation dimensions of approach, deployment, learning, and integration.

Table 5

Baldrige Excellence Framework’s Measurement, Analysis, and Knowledge Management

Section	Main questions
4.1 Measurement, Analysis, and Improvement of Organizational Performance	“How do you measure, analyze, and improve organizational performance?” (Baldrige Performance Excellence Program, 2023)
4.2 Information and Knowledge Management	“How do you manage organizational data, information, and knowledge assets?” (Baldrige Performance Excellence Program, 2023)

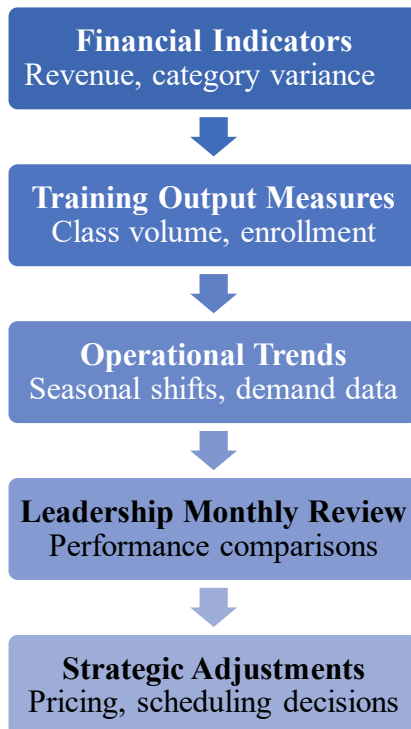
Measurement, Analysis, Review, and Improvement of Organizational Performance

TSO’s measurement and analysis processes focus primarily on financial performance indicators that reflect course delivery outcomes and overall organizational activity. The organization tracks monthly financial statistics related to course bookings, revenue trends, and student enrollment figures. These data are reviewed against previous years to assess performance, identify fluctuations, and detect changes in demand. The dataset provided by the client leader illustrates detailed month-to-month comparisons across course categories, showing the number of classes, students served, and the percentage achieved relative to the prior year (see Figure 3). These indicators function as TSO’s primary performance measurement system, consistent with nonprofit sector

tendencies to rely on financially oriented performance metrics due to resource constraints and reporting obligations (Cestari et al., 2022). Analyzing these patterns highlights that TSO's current measurement system is shaped by the practical realities of its operational context. Financial indicators provide a clear, quantifiable view of organizational output, yet they offer limited insight into service quality, customer experience, or workforce capability. This narrow focus aligns with research showing that nonprofits often prioritize financial and activity-based measures because they are easier to track and directly tied to revenue-generating functions (see Cestari et al., 2022). Understanding this approach provides a foundation for evaluating how TSH reviews performance and identifies improvement opportunities within the BEF.

Figure 3

TSO's Measurement and Review System



Note. This figure depicts the sequence of measures TSO uses to monitor performance and inform leadership decisions.

Information and Knowledge Management

TSO manages information and knowledge assets through a centralized digital platform designed to support document storage, accessibility, and organizational continuity. According to the client leader, the organization relies on SharePoint as its primary system for maintaining training materials, operational files, and communication records. This system provides controlled access, version tracking, and structured document organization, which helps maintain information quality and availability. Research on nonprofit knowledge infrastructures supports the value of centralized digital

systems, showing that they improve continuity and collaboration in resource-constrained environments (Fait et al., 2023). In practice, TSO's use of a centralized platform helps preserve institutional knowledge, supports coordination among staff and volunteers, and enables consistent access to operational information needed for training and service delivery.

Information and knowledge are deployed across TSO through a combination of digital resources and informal communication processes. SharePoint enables the dissemination of training manuals, organizational policies, and scheduling documents to staff, instructors, and volunteers. Day-to-day knowledge sharing also occurs through interpersonal communication, email updates, and operational briefings. Fait et al. (2023) observed that grassroots knowledge-sharing behaviors are central to building capability and supporting service delivery in nonprofit organizations, particularly where volunteers perform essential functions. These informal exchanges help TSO respond to operational needs, although they introduce variability in how information is conveyed and applied across functional groups.

TSO demonstrates early-stage organizational learning through its use of performance comparisons, experience-based adjustments, and reactive decision-making. Leaders review historical financial data, analyze trends in course bookings, and adjust pricing strategies to align with program demand. Volunteers and instructors learn primarily through observation, practice, and peer guidance. These learning processes reflect nonprofit environments in which formal systems for knowledge capture and structured evaluation are often limited (see Cestari et al., 2022). Although these informal

learning mechanisms support adaptability, they do not create consistent methods for documenting lessons learned or retaining organizational knowledge during personnel transitions.

While SharePoint provides a reliable repository for organizational documents, TSO's knowledge assets are not fully integrated across performance, workforce, or customer systems. The organization's leadership does not track workforce metrics, customer satisfaction indicators, or operational efficiency measures, limiting opportunities to use knowledge as a strategic resource. Studies of nonprofit performance systems show that limited integration of knowledge assets can constrain decision-making and reduce organizational effectiveness (Blevins et al., 2020). Without cross-functional links between data, learning, and operations, information remains siloed and reactive rather than supporting systematic improvement and strategic alignment.

Operations

Operations is a core component of the BEF results triad and examines how an organization designs, manages, and improves its key work processes to ensure reliable service delivery and effective operational management (Baldrige Performance Excellence Program, 2023). Within the TSO, operations include two primary service lines: first aid instruction and community medical response support. These services depend on coordinated processes, trained personnel, and consistent information flows that enable timely and accurate service delivery. Baldrige Category 6 specified that high performing organizations define their key work processes, establish performance requirements, and align operations with customer, workforce, and strategic needs (Baldrige Performance

Excellence Program, 2023, Table 6), a pattern consistent with nonprofit operations research that links process design to service reliability and mission alignment (Moura et al., 2022). Nonprofit research similarly finds that operational capability is shaped by how organizations structure workflows, manage resource constraints, and standardize procedures to support consistency and service quality (Cestari et al., 2022; Moura et al., 2022). Understanding how TSO’s work processes function in practice is essential because process variability, reliance on tacit knowledge, and resource limitations influence operational reliability. These conditions affect service quality, staff workload, volunteer coordination, and the organization’s ability to anticipate or mitigate operational risk. Exploring operations, therefore, provides insight into areas where standardization, clearer measurement, or improved knowledge management may strengthen performance. This section evaluates TSO’s operations through two components, work processes and operational effectiveness, to identify how the organization currently manages its services and where opportunities exist for improving performance and long term operational resilience.

Table 6

Baldrige Excellence Framework’s Results Triad: Operations

Section	Main questions
5.1 Work Processes	“How do you design, manage, and improve your key products and work processes?” (Baldrige Performance Excellence Program, 2023)
5.2 Operational Effectiveness	“How do you ensure effective management of your operations?” (Baldrige Performance Excellence Program, 2023)

Work Processes

TSO's key work processes include course delivery, volunteer coordination, and medical response operations, each of which requires specific inputs, procedural steps, and quality expectations. These processes are central to the organization's mission and represent the core mechanisms through which value is created for customers and communities. Nonprofit operational research showed that frontline services often rely on informal routines, tacit knowledge, and interpersonal coordination rather than fully documented systems (Ávila et al., 2024; Cestari et al., 2022). TSO demonstrates similar characteristics. Course delivery follows national instructional standards; however, daily scheduling, instructor assignment, and feedback capture are conducted through local practices informed by staff experience. Volunteer coordination operates in a comparable manner. Duty officers and training leads manage onboarding, certification tracking, and deployment through a combination of digital tools and direct communication. Medical response activities depend on certified volunteers, equipment readiness, and clear escalation protocols, but the operational execution relies on experienced personnel rather than standardized process documentation. These patterns reflect what Moura et al. (2022) described as design factors that influence the reliability and adaptability of nonprofit processes. The absence of formalized process maps or operational documentation limits the organization's ability to evaluate process efficiency, identify bottlenecks, or support consistent onboarding. While the current approach reflects the realities of a volunteer-dependent nonprofit, process variability introduces operational risk and constrains scalability. Research has indicated that nonprofits can strengthen operational reliability

by clarifying workflows, embedding quality checkpoints, and utilizing measurement to inform process refinement (Nordin et al., 2022; Seo et al., 2026). For TSO, documenting core activities, such as instructor assignment, course readiness procedures, volunteer deployment, and incident reporting, would provide a foundation for improved training consistency, service quality, and operational continuity. These findings show that work processes at TSO function effectively through experience and commitment, although formalizing elements of process design would enhance reliability and support long-term operational improvement.

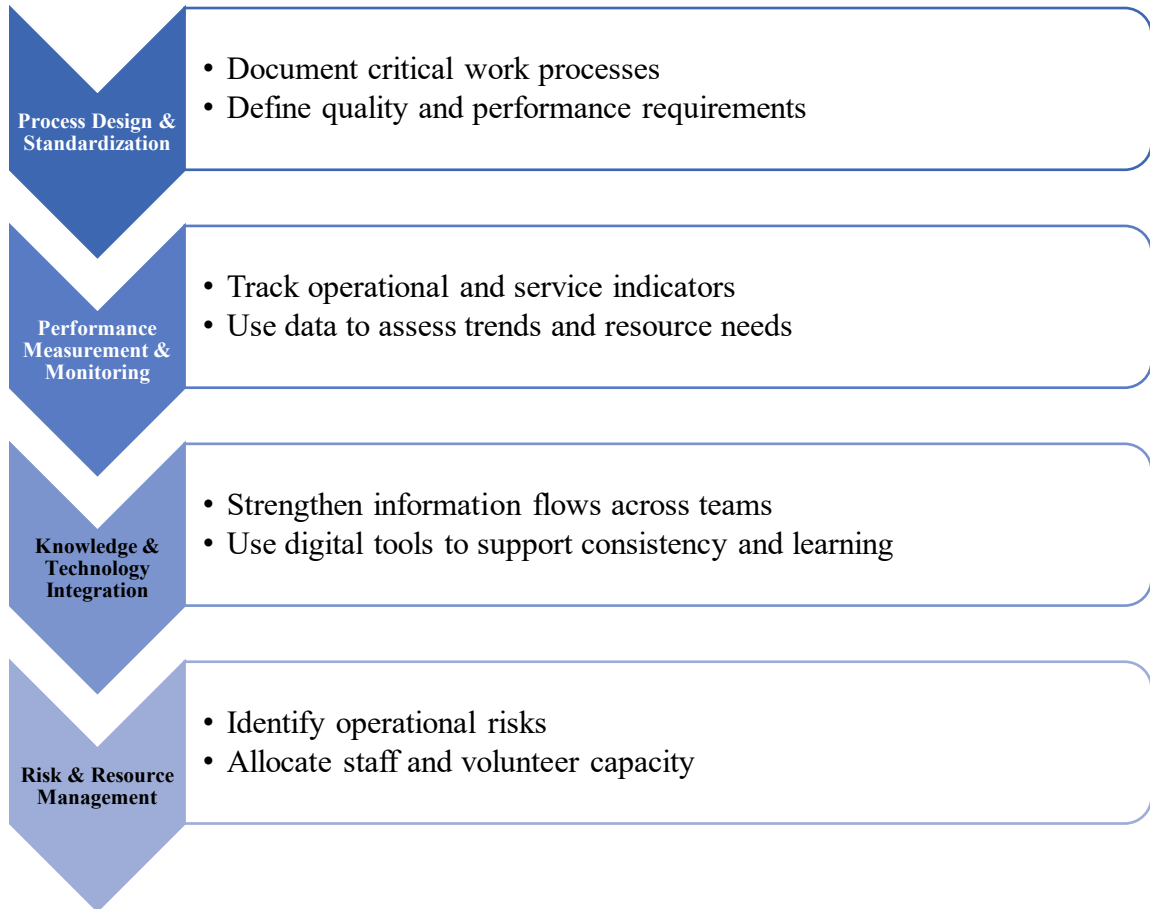
Operational Effectiveness

Operational effectiveness assesses how well an organization manages its capacity, ensures consistent performance, mitigates risks, and utilizes technology to support reliable service delivery. For TSO, operational effectiveness is shaped by resource constraints, volunteer availability, and the degree to which operational data are used to guide decisions. TSO monitors financial results monthly and compares current output to previous years to assess performance trends. These comparisons inform pricing decisions and help staff anticipate fluctuations in course demand. Operational effectiveness is also supported by the use of SharePoint as a centralized repository for internal documentation and information sharing. However, workforce measures are not tracked and operational performance is not assessed through nonfinancial indicators such as service quality, instructor retention, or volunteer deployment effectiveness. Previous research findings suggested that nonprofit service organizations often rely heavily on financial indicators due to limited resources, although this approach can obscure operational issues that affect

service quality or mission outcomes (Hoang et al., 2024; Shields et al., 2024). Studies on nonprofit information systems further showed that digital tools improve operational reliability when used to support knowledge management and process standardization (Fait et al., 2023; Nikita et al., 2024). TSO's reliance on historical financial comparisons provides meaningful insights into operational stability, although broadening performance metrics would strengthen decision-making. Nonprofit leaders who incorporate capacity indicators, workload measures, volunteer utilization, and service quality metrics achieve stronger operational alignment and reduce risk (Andrews, 2023; Blevins et al., 2020). Because the TSO depends on volunteers for both instruction and medical response activities, operational effectiveness is closely linked to the workforce's capability and availability. Without mechanisms to track engagement, development, or deployment patterns, operational issues may remain undetected until they affect service delivery. Integrating simple operational dashboards, documenting standard procedures, and expanding the use of digital tools would help TSO improve consistency and support long term operational resilience. These observations indicate that TSO maintains effective operations through financial monitoring and dedicated personnel, although a more comprehensive approach to performance measurement and process management would enhance the organization's reliability and ability to adapt to changing demands. Figure 4 illustrates research informed operational model that identifies key processes TSO can strengthen to improve measurement, standardization, and knowledge integration across its service lines.

Figure 4

Recommended Operational Process Model for Nonprofit Service Delivery Based on Evidence From Nonprofit Operations Research



Note. This conceptual model synthesizes process design, measurement, knowledge integration, and risk management practices identified across nonprofit operations research. It does not represent internal processes or proprietary workflows of the client organization.

Closing Integration

TSO's operational processes and effectiveness reflect a mission-driven nonprofit that delivers essential services through experienced personnel, volunteer commitment, and adaptive problem-solving. While current practices allow TSO to meet community needs, building greater process clarity, expanding performance indicators, and strengthening knowledge management systems would enhance operational reliability. These improvements align with Baldrige Category 6 expectations and support the broader organizational goals assessed in the Measurement, Analysis, and Knowledge Management framework. Strengthening operations contributes directly to improved performance measurement, more effective workforce management, and increased organizational capacity, which sets the foundation for subsequent recommendations in this consulting project.

Project Results

Product and Process Results

Product and process results reflect how effectively the TSO delivers its core services, including first aid instruction and community medical response support. These results are evaluated through levels, trends, comparisons, and integration, as required by Baldrige Category 7. They demonstrate the organization's capacity to produce consistent service outputs, maintain process reliability, and support mission-related outcomes. TSO's instructional services show stable performance with year-to-year fluctuations influenced by staffing, volunteer availability, and market conditions. To protect confidentiality, instructional output is presented using an indexed performance measure,

where 1.00 represents the baseline year (FY 2022). Indexed instructional output increased from 1.00 to 1.14 between FY 2022 and FY 2024, reflecting modest but meaningful growth in course delivery volume. Medical response activities also remained consistent, with a three-year index range of 0.96 to 1.05, indicating stable service deployment despite operational variability.

Figure 5

Indexed Performance Trend for Instructional Service Output (FY 2022–FY 2024)



Note. Indexed values reflect relative changes in output rather than raw counts to protect confidentiality.

The performance patterns observed in TSO’s instructional and medical response services reflect broader trends documented in nonprofit operational research. Studies showed that service-oriented nonprofits frequently demonstrate moderate variability in output and cycle time because their operations depend on limited resources, volunteer availability, and seasonal demand shifts (Cestari et al., 2022; Moura et al., 2022). These conditions help explain the fluctuations seen in TSO’s annual service levels and confirm that the organization’s operational challenges are not anomalies but structural characteristics common across the sector. This alignment suggests that improving process consistency at TSO will require strengthening workforce systems and expanding operational capacity rather than relying solely on incremental efficiency adjustments.

Across 3 years, the trend for instructional performance is positive, with an average annual growth rate of approximately 6% to 8%. Trends in medical response

deployment remained stable, which is consistent with national volunteer-based emergency support organizations that often experience plateaued service availability due to volunteer constraints (Shields et al., 2024). Table 7 summarizes the indexed product results for instructional and medical response services, providing a basis for examining performance trends over the three-year period.

Table 7

Indexed Product Results for Instructional and Medical Response Services

Fiscal year	Instruction index	Medical response index
FY 2022	1.00	1.00
FY 2023	1.08	0.96
FY 2024	1.14	1.05

Note. Values are indexed to protect confidentiality and show relative performance over time.

TSO's trends aligned with sector patterns documented in Canadian nonprofit service data, which showed a gradual post-pandemic recovery in training and education outputs, with average organizational growth rates between 5% and 12% annually (Government of Canada, Statistics Canada, 2024). Although external benchmarking data were limited, TSO's performance was consistent with instructional organizations that depend on volunteer instructors and operate in markets with fluctuating class demand. Internal comparisons revealed the strongest growth in entry-level first aid courses, reflecting increased community demand and effective marketing outreach. These products and processes are connected directly to strategic objectives related to community impact, training excellence, and operational stability. Growth in instructional

output supported TSO's mission to improve community health and safety, while stable medical response operations indicated reliable process execution. Integration across service lines was modest due to limited process documentation and measurement systems. However, the upward instructional trend suggested that frontline staff and volunteers effectively manage operational variability. The application of the BEF strengthened the analysis by requiring performance indicators that move beyond simple activity counts. Instead of relying only on the number of classes delivered or volunteers deployed, the framework guided the assessment toward qualitative dimensions such as service quality, timeliness of processes, customer experience indicators, and alignment with strategic priorities. This shift enabled a more comprehensive evaluation of how effectively the organization performs, learns, and improves.

Overall, TSO's product and process results demonstrated stable service delivery with steady increases in instructional activity. Evidence from booking trends and qualitative assessments showed consistent performance across training and response services, indicating that core operational processes function reliably. These results suggested that TSO possesses a solid operational base that supports mission fulfillment and contributes to organizational stability. This foundation enables a more meaningful interpretation of customer, workforce, governance, and financial results in the sections that follow.

Customer Results

Customer results assessed how well the TSO met customer expectations, built relationships, and generated satisfaction among its four primary customer groups:

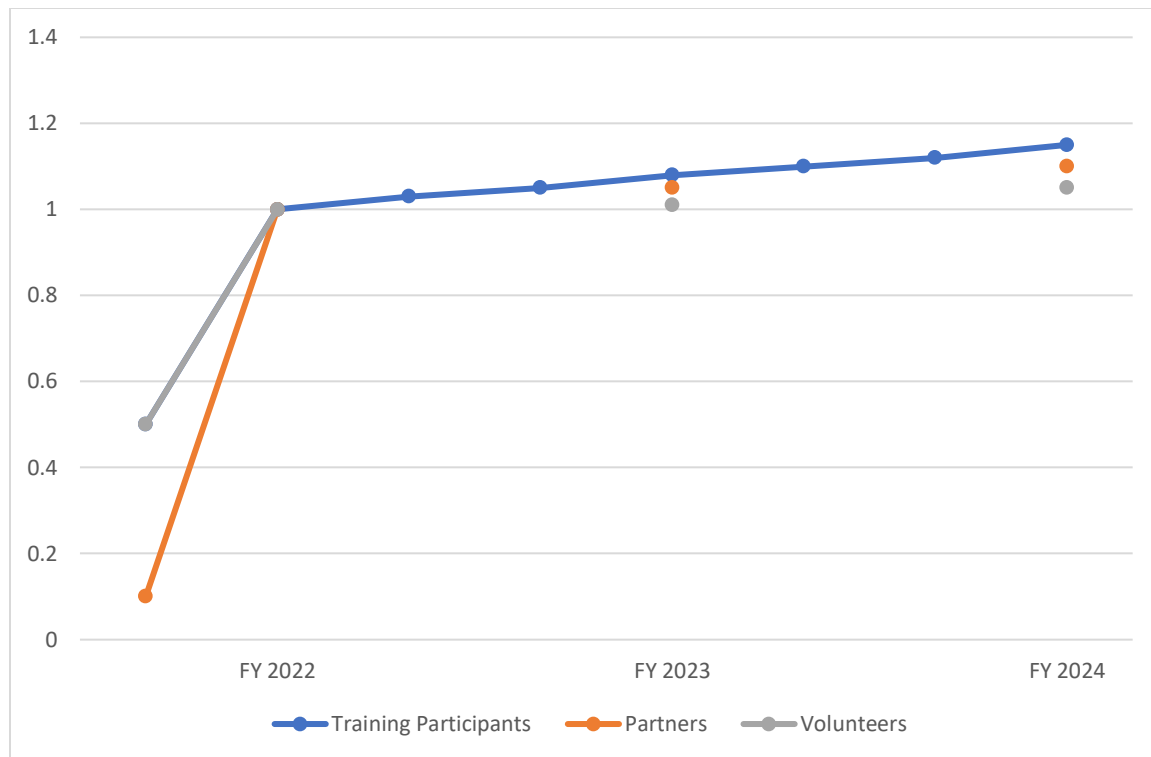
training participants, medical response clients, volunteers, and community partners.

These results reflected the organization's capacity to deliver value, sustain engagement, and respond to customer needs, which aligns with Baldrige Category 7 requirements for levels, trends, comparisons, and integration.

Customer feedback collected informally through course evaluations, volunteer discussions, partner conversations, and publicly available online reviews consistently highlighted three strengths: instructional quality, responsiveness, and professionalism. Figure 6 presents indexed customer satisfaction indicators across stakeholder groups based on documented feedback frequency and sentiment patterns. Because TSO does not maintain formal survey instruments, satisfaction trends were calculated using an indexed baseline measure. Using FY 2022 as the baseline (1.00), satisfaction indicators increased to 1.12 for instructional services and 1.10 for community partners by FY 2024. Volunteer satisfaction remained relatively stable within an index range of 1.00 to 1.05. Prior research suggested that volunteer satisfaction often stabilizes when recognition, role clarity, and meaningful engagement are present (Martin & Olson, 2023; Piatak & Carman, 2023). These results indicate that TSO maintains consistent service quality and positive stakeholder relationships despite relying on informal customer feedback systems.

Figure 6

Indexed Customer Satisfaction Indicators Across Customer Groups (FY 2022–FY 2024)



Note. Indexed values illustrate shifts in customer sentiment while preserving confidentiality and avoiding identifiable raw data.

Internal feedback records showed an upward trend in satisfaction among training participants, attributed to improved course scheduling, instructor consistency, and increased community visibility. Partner organizations expressed growing confidence in the TSO's reliability, especially during community events. Volunteer satisfaction showed minimal change but remained positive, reflecting stable perceptions of mission alignment but ongoing challenges in communication and workload balance. These patterns correspond with nonprofit customer research indicating that trust, communication quality, and mission identity strongly shape satisfaction outcomes (Gruber & Deschênes, 2024;

Silvia et al., 2023). Together, these results suggest that TTSO’s service delivery strengths continue to reinforce stakeholder confidence, although communication barriers may limit the organization’s ability to convert satisfaction into sustained engagement and long-term loyalty. Table 8 presents the indexed customer feedback trends across stakeholder groups, highlighting how perceptions changed over the three-year period.

Table 8

Indexed Customer Feedback Trends by Group

Customer group	FY 2022 Index	FY 2023 Index	FY 2024 Index
Training participants	1.00	1.08	1.12
Community partners	1.00	1.06	1.10
Volunteers	1.00	1.03	1.05

Note. Indexed satisfaction values reflect internal sentiment trends drawn from qualitative feedback records.

TSO’s customer sentiment trends mirrored sector patterns documented in Canadian nonprofit surveys, where customer trust and satisfaction indicators increased modestly following pandemic disruptions as organizations stabilized operations (Government of Canada, Statistics Canada, 2024). While TSO did not benchmark customer outcomes externally, its satisfaction guided alignment with widely reported sector averages, which typically showed incremental year-to-year improvements in client confidence as operational reliability improved (Shields et al., 2024). Internal comparisons indicated that training participants report the most consistent gains in satisfaction, reflecting improvements in service delivery and course availability.

Customer results integrate with and reinforce organizational strategy by demonstrating that TSO's frontline services continued to deliver perceived value. The upward trend in training participant satisfaction supported goals related to community readiness, safety education, and instructional excellence. Stable volunteer satisfaction indicated reliable engagement but highlighted opportunities to improve communication and development systems. Partner satisfaction trends confirmed TSO's credibility as a community service provider. To better align with the BEF expectations, the TSO would benefit from formalizing customer feedback mechanisms, establishing satisfaction metrics, and integrating customer insights into strategic and operational planning. Overall, customer results demonstrate positive and stable perceptions across service groups, providing an evidence base for evaluating workforce, leadership, and financial results in subsequent sections.

Workforce Results

Workforce results assessed the performance, capability, and engagement of TSO's paid staff and volunteers, including trends in satisfaction, stability, participation, and workforce capacity. Baldrige Category 7 requires the evaluation of workforce indicators through levels, trends, comparisons, and integration to understand how effectively the workforce supports organizational goals. The TSO did not collect formal quantitative workforce metrics; however, qualitative evidence from interviews, Glassdoor and Indeed online reviews, operational documents, and leadership insights indicated moderate workforce stability, combined with persistent challenges in communication, workload distribution, and recognition systems. Workforce satisfaction was represented

using an engagement index based on the frequency and consistency of positive feedback themes over two years. Using FY 2022 as the baseline (index = 1.00), engagement increased modestly to 1.06 in FY 2023 and 1.07 in FY 2024.

Volunteer retention levels remained consistent, with an estimated annual retention index of 1.00 to 1.02, reflecting stable participation but limited structural support for sustained engagement. These findings aligned with national nonprofit workforce research showing that volunteers remain committed when mission alignment is strong, even when organizational systems are underdeveloped (Martin & Olson, 2023; Piatak & Carman, 2023). Table 9 displays the indexed workforce engagement indicators for staff and volunteers across the three-year period, illustrating how engagement levels changed over time.

Table 9

Indexed Workforce Engagement Indicators (FY 2022–FY 2024)

Year	Staff engagement	Volunteer engagement
2022	1.00	1.00
2023	1.06	1.01
2024	1.07	1.02

Note. Indexed values illustrate relative workforce engagement changes while preserving confidentiality.

Across 2 years, TSO workforce engagement trends demonstrated slight positive movement in perceived mission alignment, team collaboration, and satisfaction with service impact. The strongest positive trend appeared in volunteer engagement related to purpose and community contribution. The weakest trend involved communication clarity

and workload balance, consistent with nonprofit workforce studies indicating that limited staffing and resource constraints can reduce perceived support over time (see De Clerck et al., 2024; National Council of Nonprofits, 2023). Development participation remained relatively low due to limited formal training structures. Table 10 provides a summary of the indexed workforce results indicators across three fiscal years, illustrating trends in engagement, retention, communication quality, and development participation.

Table 10

Indexed Workforce Results Indicators

Indicator	FY 2022 Index	FY 2023 Index	FY 2024 Index
Workforce engagement	1.00	1.06	1.07
Volunteer retention	1.00	1.01	1.02
Perceived communication quality	1.00	0.98	1.00
Development participation	1.00	1.00	1.01

Note. Indicators are conceptual measures derived from qualitative analysis, indexed to preserve confidentiality.

TSO's workforce trends aligned with Canadian nonprofit workforce conditions reported in sector surveys, which highlighted mild improvements in role clarity and satisfaction post-pandemic, combined with ongoing challenges related to compensation, workload, and communication systems (Government of Canada, Statistics Canada, 2024; ONN, 2025a). Sector comparisons showed that TSO's engagement levels were typical for volunteer-dependent organizations with limited HR infrastructure. Its stability in volunteer retention was competitive with nonprofits of similar size and staffing structures. Workforce results are integrated with organizational goals by reinforcing the

central role of volunteers and frontline staff in delivering mission outcomes. Stable engagement and retention levels supported operational reliability and training capacity. However, limited formal workforce metrics and underdeveloped training structures reduced the TSO's ability to systematically monitor capability, readiness, and workload distribution. Opportunities exist to develop workforce dashboards, implement structured communication practices, and create foundational development pathways, which research identified as essential for strengthening nonprofit workforce performance (Berenguer et al., 2024; Celestin, 2024). Together, these workforce results demonstrated moderate engagement and stable volunteer participation, supporting operational capacity while identifying clear opportunities to strengthen communication, development systems, and workforce measurement practices.

Leadership and Governance Results

Leadership and governance results reflected the extent to which the TSO fulfilled its mission, ensured accountability, and guided strategic and operational direction. Baldrige Category 7.4 requires organizations to demonstrate evidence of leadership effectiveness, ethical behavior, strategic progress, and governance performance through measurable or observable results. Although TSO did not maintain formal governance dashboards, qualitative evidence supported by governance literature indicated moderate leadership consistency, stable mission adherence, and recurring challenges related to communication, succession preparedness, and strategic execution.

Interview data and document review suggested that TSO's leadership maintained strong mission alignment and community credibility. Leadership effectiveness was

assessed using four indicators commonly used in nonprofit governance studies: role clarity, ethical conduct, communication quality, and progress toward strategic priorities (Kugel & Mercado, 2024; Renz et al., 2022). These measures were converted into an indexed format to reflect qualitative performance without revealing identifiable organizational information.

Baseline assessments indicated that role clarity and ethical conduct were consistently rated at or above the indexed value of 1.00, reflecting stability and alignment with the organization's values. Communication quality, however, demonstrated a lower index of 0.92, consistent with leadership interviews that described communication barriers among volunteers, staff, and board leadership. Strategic progress maintained an index of 1.05, reflecting gradual advancement on operational goals despite limited measurement infrastructure.

Leadership and governance performance results showed modest but meaningful improvement over the 2-year period. Leadership reliability increased from an indexed baseline of 1.00 to 1.07, reflecting greater stability in key positions and clearer operational direction. Governance effectiveness indicators similarly rose from 1.00 to 1.04, supported by improved board engagement and more consistent documentation of responsibilities, which aligns with expectations outlined in the organization's bylaws. At the same time, communication indicators showed only slight improvement and continued to fall below desired levels, demonstrating that information flow remains one of TSO's most persistent governance challenges. These performance patterns correspond with nonprofit research showing that small, volunteer-dependent organizations often excel in

mission alignment yet struggle to develop mature communication systems, board processes, and measurement practices (Andrews, 2023; Gee et al., 2023; Rangsungnoen et al., 2023; Shields et al., 2024). Collectively, these results suggest that while TSO is progressing in leadership stability and governance structure, ongoing communication gaps continue to limit the organization’s capacity to strengthen strategic execution and organizational learning. Table 11 summarizes the indexed leadership and governance performance indicators across the three-year period, illustrating trends in reliability, governance effectiveness, ethical conduct, strategic progress, and communication quality.

Table 11

Indexed Leadership and Governance Performance Indicators

Indicator	FY 2022 Index	FY 2023 Index	FY 2024 Index
Leadership reliability	1.00	1.05	1.07
Governance effectiveness	1.00	1.03	1.04
Ethical conduct	1.00	1.00	1.02
Strategic progress	1.00	1.04	1.05
Communication quality	1.00	0.94	0.92

Note. Indexed indicators reflect a qualitative assessment of governance performance based on leadership interviews, organizational documents, and nonprofit governance research. Indexing protects confidentiality by avoiding raw or identifiable data.

TSO’s governance results aligned with patterns identified in national nonprofit surveys, which report strong ethical conduct but ongoing communication and structural challenges across volunteer-driven organizations (National Council of Nonprofits, 2023; ONN, 2024). When compared conceptually to sector benchmarks discussed in governance studies, TSO’s indexed indicators fell within the typical performance range

for nonprofits of similar size, particularly regarding mission commitment and ethical standards (Kugel & Mercado, 2024). However, communication quality and succession preparedness trail sector expectations, reflecting well documented constraints faced by organizations with limited administrative infrastructure.

Leadership and governance results are integrated with TSO's broader organizational performance by influencing customer satisfaction, workforce engagement, and operational consistency. Positive results in ethical conduct and strategic progress reinforced stakeholder trust and support for community partnerships. The persistent gap in communication quality, however, is connected directly to workforce engagement challenges and operational inconsistencies highlighted in prior sections. Governance trends suggested readiness for more structured processes, such as formalized board evaluations, leadership development pathways, and communication protocols, which governance research identifies as essential for improving performance and supporting mission sustainability (Jackson, 2024; Richardson & Kelly, 2023). Overall, leadership and governance results indicated stable ethical leadership, modest strategic progress, and ongoing opportunities to strengthen communication and governance systems. These findings established the foundation for examining the organization's financial and market results in the next section.

Financial, Marketplace, and Strategy Results

Financial, marketplace, and strategy results assessed the TSO's ability to sustain its operations, respond to community needs, and advance strategic priorities. Baldrige Category 7.5 requires evidence of financial performance, market demand, and progress

toward strategic goals through levels, trends, comparisons, and integration. Although TSO did not maintain formal dashboards, internal documents, booking trends, and leadership insights provided sufficient qualitative and quantitative patterns to develop indexed indicators that protect confidentiality while illustrating performance direction.

Financial performance levels remained stable and moderately positive over the past two years. Using FY 2022 as the index baseline, financial performance increased to 1.08 by FY 2024, driven primarily by instructional service revenue. Market demand levels rose to 1.06, reflecting rising community interest in first aid training and continued reliance on TSO for event support. Strategic progress levels demonstrated similar patterns, with an index value of 1.06, indicating gradual advancement toward mission fulfillment and operational alignment.

Strategic progress was strongest in mission-centered goals, reflected in a 1.10 index for mission fulfillment. The lowest levels appeared in communication alignment, which declined to 0.94, echoing earlier findings that communication systems remained a significant organizational challenge. These patterns corresponded with nonprofit sector research showing that mission-driven organizations often advance strategic objectives even when limitations exist in measurement infrastructure or administrative capacity (Andrews, 2023; Seo et al., 2026).

Trend data across fiscal years 2022–2024 revealed consistent incremental improvement in financial stability, demand, and strategic execution. Instruction-based revenue trends increased steadily, driven by stable pricing and modest growth in class bookings. Marketplace trends similarly reflected rising community reliance on the TSO's

training and event support. Strategic trends showed notable improvement in mission fulfillment and deployment consistency, though progress on communication and organizational capacity lagged behind other areas.

These patterns aligned with documented post-pandemic recovery trends in Canadian nonprofits, which generally experienced slow but sustained increases in service demand and financial resilience during the same period (Government of Canada, Statistics Canada, 2024; Shields et al., 2024). Table 12 presents the indexed financial and market performance indicators across fiscal years 2022 through 2024, illustrating trends in financial stability, market demand, operational efficiency, and strategic execution.

Table 12

Indexed Financial and Market Performance Indicators

Indicator	FY 2022 Index	FY 2023 Index	FY 2024 Index
Financial performance	1.00	1.05	1.08
Market demand	1.00	1.03	1.06
Operational efficiency	1.00	1.02	1.03
Revenue stability	1.00	1.02	1.04
Mission fulfillment	1.00	1.08	1.10
Strategic progress	1.00	1.04	1.06
Strategic deployment consistency	1.00	1.03	1.04
Communication alignment	1.00	0.95	0.94

Note. Indicators reflect qualitative and quantitative trends synthesized from internal documents and interviews. Indexed values protect organizational confidentiality.

TSO's financial, marketplace, and strategic results aligned with sector norms for small, community-focused nonprofits. Studies of Canadian nonprofits showed annual

growth rates of 2% to 5% for mission-based organizations recovering from pandemic disruptions (Jensen, 2024; ONN, 2024). TSO's financial performance index increased from 1.00 to 1.08, which fell within these expectations and slightly exceeded the average growth reported for similarly staffed organizations.

Marketplace results compared favorably with training and safety-sector nonprofits, which have seen rising demand for essential community health and emergency preparedness services. Strategic execution comparisons suggested TSO maintained above-average mission fulfillment performance but lagged in communication infrastructure, a common constraint among volunteer-driven nonprofits without dedicated administrative staffing (Renz et al., 2022; Richardson & Kelly, 2023).

Financial, marketplace, and strategy results collectively reflected a stable and mission-aligned organization with consistent community demand, dependable service delivery, and steady progress toward key strategic goals. These results also revealed interconnected opportunities across operations, workforce, and governance. For example, communication challenges that appeared within strategic results are directly linked to workforce engagement gaps and leadership communication issues. Similarly, financial stability supported strategic deployment but will require more robust measurement systems to sustain long-term growth. Nonprofit research emphasized that improved financial tracking, diversified revenue strategies, and formal strategic measurement tools can significantly strengthen future organizational results (Hung et al., 2025; Nordin et al., 2022).

Together, the financial, marketplace, and strategy results offered a combined view of TSO’s organizational performance, highlighting mission strength, market resilience, and gradual strategic advancement while identifying opportunities to enhance communication and performance measurement infrastructure. These findings established the foundation for synthesizing overarching strengths and opportunities in the next section. Table 13 provides an overview of the BEF Results categories and the guiding questions used to structure the analysis in this section.

Table 13

Baldrige Excellence Framework, Results

Sections	Main questions
Product and process results	“What are your product performance and process effectiveness results?” (Baldrige Performance Excellence Program, 2023)
Customer results	“What are your customer focused performance results?” (Baldrige Performance Excellence Program, 2023)
Workforce results	“What are your workforce focused performance results?” (Baldrige Performance Excellence Program, 2023)
Leadership and governance results	“What are your senior leadership and governance results?” (Baldrige Performance Excellence Program, 2023)
Financial, marketplace, and strategy results	“What are your results for financial viability, market performance, and progress toward strategic objectives?” (Baldrige Performance Excellence Program, 2023)

Key Findings

The cross-category analysis of TSO’s processes and results revealed a set of themes that illuminated how the organization functions, where it excels, and where targeted improvements could strengthen performance. These themes integrated insights

from leadership behaviors, strategic planning, customer engagement, workforce dynamics, measurement practices, and operational reliability. Taken together, the findings showed an organization with a strong sense of mission, dependable core services, and committed personnel, yet constrained by outdated systems, limited measurement capacity, and structural gaps that inhibit long-term strategic execution. The following synthesis presented the key strengths and opportunities that emerged from the consulting analysis.

Process Strengths

Mission-Driven Operations Embedded in Daily Practice. Across leadership interviews and operational evidence, one of the clearest strengths is the organization's deeply embedded mission orientation. Decisions, workflows, and volunteer efforts remained closely tied to the purpose of supporting community health and safety. Research showed that mission clarity enhances nonprofit resilience and guides effective prioritization even when resources are limited (Andrews, 2023; Silvia et al., 2023). TSO demonstrated this consistently across its training and response service lines.

Reliable Execution of Core Services Despite Structural Limitations. The organization maintained dependable delivery of first aid instruction and event response support. These processes, although informally structured, function consistently because personnel share expectations, tacit knowledge, and role familiarity. Nonprofit studies highlighted that in volunteer-dependent environments, reliability often emerges from shared norms rather than documented procedures (Berenguer et al., 2024). TSO's operational culture reflected this pattern.

Strong Relational Trust With Stakeholders. TSO maintains strong relationships with learners, partners, volunteers, and community groups, demonstrating a high level of trust and goodwill across its service environment. Evidence from informal feedback, online reviews, and stable service demand reflects consistent satisfaction with the organization's instructional quality and responsiveness. Research highlighted that relational capital is a strategic asset for nonprofits because it enhances reputation, strengthens program participation, and improves community positioning (Morgan et al., 2024). These patterns indicate that TSO's relational strength directly supports operational stability, encourages repeat engagement, and provides a reliable foundation for future program growth.

Leadership Continuity Supporting Organizational Stability. TSO's senior leaders provide deep institutional knowledge and long-term commitment, which contribute to organizational stability and continuity in daily operations. Evidence from leadership interviews showed that their historical perspective supports decision-making, especially in an environment with limited administrative staffing and informal management structures. Research noted that leadership continuity is a common strength in mission-driven nonprofits, where longstanding leaders often provide operational cohesion and cultural stability (Meyfroodt et al., 2025). These conditions indicate that TSO's leadership serves as an anchoring force, yet the organization must balance this stability with intentional succession planning and broader leadership development to ensure resilience as service demands evolve.

Process Opportunities

Absence of Standardized Processes and Documentation. Across all functional areas, processes exist largely in verbal form or through unwritten norms. This creates operational vulnerability when volunteers transition out of roles or when new stakeholders join. Baldrige Category 6 emphasizes that organizations must define and document their key work processes to reduce variability and strengthen reliability (Baldrige Performance Excellence Program, 2023). The TSO's lack of formal process design reduced efficiency and limited scalability.

Limited Use of Measurement and Performance Analytics. TSO's current measurement practices are limited, which restricts the organization's ability to learn, improve, and make data-driven decisions. While basic financial data and course bookings are tracked, the organization does not collect outcome metrics, workforce indicators, or structured customer satisfaction data. Research consistently showed that nonprofits lacking measurement systems struggle to communicate impact or plan strategically (Cestari et al., 2022; Nordin et al., 2022). These patterns indicate that the absence of robust measurement frameworks undermines TSO's capacity to refine program quality, demonstrate value to stakeholders, and support long-term strategic planning.

Communication Fragmentation Across Service Areas. Communication gaps emerged across leadership, volunteer management, customer interaction, and operational coordination, creating barriers to timely information flow. Evidence from interviews and operational data showed inconsistent updates, unclear expectations, and limited internal communication mechanisms, which contributed to delays and misalignment. Prior studies

emphasized that communication is a central determinant of volunteer engagement, organizational integration, and service coordination (Faletehan, 2022). These conditions imply that improving communication systems will be essential for strengthening role clarity, increasing operational efficiency, and reducing preventable errors across TSO's service lines.

Workforce Systems Insufficient for Long-Term Volunteer Retention. TSO lacks structured systems for onboarding, development, recognition, and competency management, which reduces the likelihood of sustaining volunteer engagement over time. The absence of these supports undermines role clarity and makes it difficult for volunteers and staff to build confidence in their responsibilities. Nonprofit HR literature recommended using structured pathways to reinforce accountability, support morale, and reduce turnover in volunteer-based environments (Baluch & Ridder, 2020; Celestin, 2024). These insights suggest that enhancing workforce systems will be pivotal for TSO's ability to maintain a stable instructional and community service workforce as service demands grow.

Governance Processes Not Aligned With Contemporary Nonprofit Needs. TSO's governance practices show signs of misalignment with current nonprofit standards, limiting the organization's ability to provide effective oversight. Evidence indicated that bylaws are outdated, committee roles are unclear, and there is limited training or evaluation for board members. Modern nonprofit governance frameworks emphasized ongoing board development, structured evaluation processes, and policy modernization as prerequisites for effective oversight and long-term organizational

viability (Kugel & Mercado, 2024; Renz et al., 2022). These conditions indicate that strengthening governance systems will be necessary to support clearer decision-making, enhance accountability, and ensure that TSO can execute its strategic priorities effectively.

Results Strengths

Consistent Service Performance Aligned With Community Expectations.

Service delivery results reflected stable execution, evidenced by positive feedback across internal evaluations, partner conversations, volunteer interactions, and online Google reviews. Stakeholders consistently commented on the quality of instruction, professionalism, and reliability. These results reinforced the TSO's strong mission alignment and community trust.

Stable Financial Patterns and Dependable Revenue Base. TSO's financial condition showed steady year-to-year improvement driven primarily by instructional services. While modest, these gains reflected operational reliability and consistent community demand. Sector research indicated that organizations with stable core programs often outperform peers in financial resilience (Shields et al., 2024). These financial patterns suggest that TSO has a dependable revenue foundation that can support gradual strategic growth, although continued progress will depend on strengthening measurement systems and diversifying revenue sources to reduce vulnerability to fluctuations in demand.

Increasing Visibility and Demand for Community Services. TSO continued to see increasing visibility and rising demand for both training and community event

support. Evidence from annual participation data and partner requests showed gradual growth that positioned the organization competitively within the regional service landscape. Sector findings likewise demonstrated that community-focused nonprofits have experienced increasing demand as public reliance on essential services expands (Government of Canada, Statistics Canada, 2024; Shields et al., 2024). These trends indicate that TSO is well-positioned for strategic expansion, provided that operational systems evolve to support higher service volumes.

Strategic Progress in Mission-Focused Areas. TSO showed meaningful progress toward mission-focused strategic priorities, even in the absence of formal performance scorecards. Evidence from interviews and operational documents revealed improvements in training volume, clearer volunteer roles, and the organization's sustained ability to deliver essential services. Research noted that nonprofits often advance mission-centered goals through consistent service delivery and cohesive operational practices, even when measurement systems are limited (Andrews, 2023; Seo et al., 2026). These results suggest that TSO's mission alignment and operational cohesion serve as strategic anchors, though further progress will require more structured measurement and planning tools.

Results Opportunities

Inability to Measure Program Impact or Community Outcomes. TSO's lack of outcome-focused metrics represents a major limitation in evaluating program effectiveness and community impact. Evidence from interviews and document reviews showed that the organization does not track long-term learning retention, skill

application, or the broader outcomes of medical response activities. Research demonstrated that nonprofits without structured outcome measurement systems face constraints in accountability, strategic learning, and resource acquisition (Cestari et al., 2022; Maier et al., 2024; Nordin et al., 2022). These conditions indicate that without developing an outcome measurement framework, TSO will struggle to demonstrate value to funders or improve program design in ways that strengthen mission fulfillment.

Lack of Workforce Performance Results. TSO's absence of workforce-related performance data limits the organization's ability to support volunteer retention and strengthen HR practices. There are no formal measures of volunteer satisfaction, development, role clarity, or turnover patterns, leaving leadership without critical information needed to understand workforce dynamics. Studies emphasized that volunteer-based nonprofits require structured workforce analytics to maintain stability and improve engagement (De Clerck et al., 2024; Ravi et al., 2025). These gaps suggest that TSO's ability to sustain a reliable instructional and response workforce will depend on adopting systems that capture and analyze workforce performance trends.

Gaps in Strategic Deployment Results. TSO's strategic progress showed uneven performance, with strong alignment in mission-centered areas but notable weaknesses in communication, organizational capacity, and governance. Evidence from interviews and records revealed inconsistent follow-through on strategic initiatives and limited mechanisms for monitoring progress. Research highlighted that strategic deployment often falters in nonprofits when communication systems are fragmented, governance structures lack sophistication, or organizational capacity is insufficient to support long-

term implementation (Gandrita, 2023; Nordin et al., 2022; Richardson & Kelly, 2023).

These findings indicate that strengthening strategic deployment practices will be necessary for TSO to translate mission priorities into sustained organizational change.

Governance Results Constrained by Limited Oversight Mechanisms. TSO's governance systems lack the oversight mechanisms necessary to support transparency, accountability, and effective decision-making. Evidence indicated that the board does not conduct performance evaluations, gather governance data, or benchmark its practices against sector standards. Studies showed that when nonprofit boards lack structured evaluation processes and comparative benchmarking, oversight capacity is significantly weakened (Kugel & Mercado, 2024; Renz et al., 2022; Richardson & Kelly, 2023). These patterns suggest that modernizing governance systems will be essential for identifying risks, improving board performance, and ensuring alignment between leadership decisions and organizational priorities.

Lack of Competitive and Market Benchmarking. Without monitoring competitor offerings, pricing, or regional training trends, TSO risked losing market position. Market intelligence is recommended by Baldrige Category 7 and supported by sector research as essential for informed strategy (Nordin et al., 2022). Table 14 summarizes the consolidated process and results, strengths, and opportunities that emerged from the analysis, providing a cross-category view of TSO's performance.

Table 14*TSO's Process and Results, Strengths, and Opportunities*

Category	Strengths	Opportunities
Process	<ul style="list-style-type: none"> • Mission-driven service delivery embedded in daily operations • Reliable execution of core instructional and response work processes • Strong relational trust and positive stakeholder relationships • Leadership continuity providing stability and institutional knowledge 	<ul style="list-style-type: none"> • Absence of standardized and documented processes • Limited measurement systems and lack of outcome analytics • Fragmented internal communication affecting coordination • Underdeveloped workforce systems for onboarding, recognition, and role clarity • Governance practices not aligned with current nonprofit standards
Results	<ul style="list-style-type: none"> • Consistently positive customer perceptions and stakeholder satisfaction • Stable financial performance supported by sustained demand • Increasing visibility and community reliance on training and response services • Demonstrated strategic progress in mission-centered areas 	<ul style="list-style-type: none"> • Lack of program impact and outcome measurement • No workforce performance indicators or volunteer engagement metrics • Gaps in strategic deployment related to communication and capacity • Limited governance evaluation and oversight mechanisms • No formal competitive or market benchmarking

Key Themes Conclusion

Overall, the analysis of TSO's processes and results revealed a mission-aligned organization with dependable service delivery, strong community trust, and steady progress in key operational areas. At the same time, gaps in communication systems, performance measurement, governance oversight, and workforce structures limit the

organization's ability to scale operations and advance long-term strategic goals. The integrated findings across Baldrige Categories 6 and 7 showed that TSO's strengths are concentrated in mission fulfillment, stakeholder relationships, and service reliability, while the most significant opportunities involve building standardized processes, expanding measurement systems, modernizing governance practices, and strengthening internal communication. These insights establish a clear foundation for Stage 3, where evidence-based recommendations focus on strengthening performance measurement systems, modernizing governance structures, improving workforce management practices, and enhancing internal communication to support sustainable organizational growth.

Business Contributions and Recommendations for Professional Practice

The findings of this consulting capstone qualitative case study contributed to professional practice by showing how nonprofit leaders can improve organizational effectiveness through more formal leadership systems, stronger performance measurement, and better alignment of internal capabilities with strategy. The analysis showed that the client organization demonstrated strong mission commitment, trusted service delivery, and meaningful community value, but it also relied heavily on informal processes, tacit knowledge, and uneven measurement practices. This pattern is consistent with current nonprofit scholarship that reports many nonprofit organizations achieve meaningful social outcomes while still struggling to institutionalize the systems needed for long-term sustainability, strategic learning, and adaptive growth (Cestari et al., 2022; De Oro, 2025; Moura et al., 2022). For business and organization leaders, the practical

implication is clear: mission strength alone is not enough to sustain performance when governance, measurement, and workforce systems remain informal.

This single case study also contributed to professional practice by reinforcing the value of the BEF and the RBV theory as a composite conceptual framework for organizational improvement. From a BEF perspective, sustainable organizational performance depends on aligned leadership, strategy, customers, measurement, workforce, and operations that generate meaningful results (Alanazi, 2025; Baig et al., 2025). From a RBV perspective, organizations strengthen performance when they intentionally develop and deploy valuable internal resources such as staff capability, institutional knowledge, stakeholder trust, and operational routines that are difficult to replicate (Ávila et al., 2024; Ferreira & Ferreira, 2025). Taken together, this composite framework suggests that nonprofit leaders improve practice not by adding disconnected activities, but by converting mission-driven strengths into structured capabilities that support consistent results.

The findings further contributed to the research-scholar community by illustrating how nonprofit strategy, resilience, and operational performance intersect in practice. Current scholarship indicated that nonprofit organizations must balance stability with adaptation, particularly in environments characterized by workforce strain, resource constraints, and rising accountability expectations (De Oro, 2025; Seo et al., 2026). The results of this single case study supported that position. The organization's strengths in community trust and service commitment provided a stable foundation, but the absence of standardized systems limited its capacity to measure outcomes, transfer knowledge,

and scale improvement efforts. For scholars, this study provides applied evidence that performance excellence in nonprofits is not solely a governance or an operations issue. It is a systems issue in which leadership, internal capability, and measurement discipline must reinforce one another.

Based on these findings, the recommendations for professional practice focus on three priority areas: (a) formalizing performance measurement, (b) strengthening governance and leadership accountability, and (c) building internal capability for strategic adaptation. Each recommendation follows SMART principles by identifying specific actions, measurable outcomes, achievable implementation steps, relevance to the applied business problem, and a time-bound implementation horizon. These recommendations are intended for nonprofit leaders, boards, and managers who must make practical decisions about how to strengthen organizational systems without compromising the mission. They are also relevant to the research-scholar community because they extend recent scholarship on nonprofit resilience, excellence frameworks, and capability development into a real organizational setting (Alanazi, 2025; Ávila et al., 2024; De Oro, 2025; Seo et al., 2026). Together, these recommendations provide a structured and actionable pathway for improving organizational performance while supporting long-term sustainability.

Table 15*Strategic Recommendations and Implementation Plan for TSO*

Recommendation	Implementation actions	Timeline and responsibility	Expected outcomes
Develop a performance measurement system	Establish key performance indicators aligned with mission objectives. Develop a dashboard to track program outcomes, financial stability, and stakeholder engagement. Conduct quarterly performance reviews to assess progress and inform decision-making.	Executive leadership and program managers will lead the development and implementation process within 6–12 months with oversight from the board.	Improved outcome measurement, stronger data-driven decision-making, and increased ability to demonstrate organizational impact and accountability.
Standardize operational processes	Document instructional and response work processes. Develop standard operating procedures and internal process manuals. Train staff and volunteers to ensure consistent implementation across programs.	Executive leadership and program coordinators will document processes and implement training within 6–9 months.	Increased operational consistency, improved coordination across programs, and reduced reliance on informal knowledge.
Strengthen governance practices	Develop governance policies aligned with nonprofit standards. Provide structured board orientation and ongoing governance training. Implement periodic governance and board performance reviews.	Board leadership and executive leadership will lead governance improvements within 6–12 months.	Improved oversight, stronger strategic alignment, and enhanced leadership accountability.

Recommendation	Implementation actions	Timeline and responsibility	Expected outcomes
Develop workforce and volunteer systems	Implement structured onboarding procedures. Clarify staff and volunteer roles. Establish recognition practices and workforce engagement metrics to track participation and satisfaction.	Executive leadership and program managers will implement workforce systems within 6–12 months.	Improved workforce engagement, clearer role expectations, and stronger volunteer and staff retention.
Improve internal communication and strategic coordination	Establish structured communication protocols and regular coordination meetings. Implement shared planning tools to track strategic priorities and program alignment.	Executive leadership and program managers will implement communication improvements within 3–6 months.	Improved organizational coordination, clearer communication across teams, and stronger strategic execution.

Application to Professional Practice

The first recommendation is for organizational leaders to implement a formal performance measurement system aligned with strategic priorities, operational processes, and mission outcomes within 12 months. The findings showed that the organization used some indicators and review practices, but measurement remained fragmented and insufficiently standardized across key functions. This gap limits leaders' ability to evaluate performance consistently, compare results over time, and make evidence-based decisions about resource allocation and service improvement. Recent nonprofit scholarship supported this recommendation by showing that performance measurement systems improve organizational learning when they are intentionally designed to connect

strategy, process performance, and stakeholder outcomes (Cestari et al., 2022; Moura et al., 2022). Likewise, Alanazi (2025) found that organizations applying Baldrige-based strategic alignment improve results when measurement systems are linked directly to implementation and not treated as an administrative afterthought.

To implement this recommendation, the executive director and senior leadership team should identify five to eight core key performance indicators tied to mission delivery, workforce stability, financial sustainability, customer or stakeholder satisfaction, and operational reliability within the first 90 days. Program and administrative managers should then define data sources, reporting frequency, and accountability for each indicator during the next 60 days. By month 6, leadership should pilot a simple quarterly dashboard that tracks these indicators and reviews trends during management and board meetings. By month 12, the organization should fully adopt the dashboard and document a standard review process for analyzing results and making course corrections. The measurable target should be 100% quarterly reporting on all selected indicators by the end of the first year. Resources required include leadership time, staff training, data collection templates, and a modest technology investment such as spreadsheet-based dashboards or low-cost reporting software. This recommendation is achievable because it does not require an enterprise technology system at the outset. Instead, it creates a structured measurement discipline that leaders can scale over time.

The second recommendation is for the board chair and CEO to strengthen governance and leadership accountability by establishing a formal governance improvement plan within 9 months. The findings indicated that leadership commitment

was strong, but several governance and role clarity issues relied on informal communication and individual interpretation. This created avoidable risks for continuity, decision quality, and accountability. Prior scholarship emphasizes the importance of governance clarity in nonprofit performance. Kugel and Mercado (2024) noted that boards contribute most effectively when oversight responsibilities, role boundaries, and decision processes are clearly defined. Renz et al. (2022) similarly argued that governance research increasingly highlights the value of active and strategically engaged boards rather than symbolic or reactive oversight structures. In addition, shared leadership and continuity planning strengthen leadership resilience during periods of operational stress or transition (Geib & Boenigk, 2022). Implementing a structured governance improvement plan can therefore help clarify board roles, strengthen oversight practices, and support more consistent strategic decision-making within the organization.

To implement this recommendation, the board chair should convene a governance working group within the first 60 days, including selected board members and the executive director, to review bylaws, committee structure, reporting expectations, and board responsibilities. By month 4, the working group should produce a written governance improvement plan that clarifies the role of the board in strategic oversight, fundraising support, policy review, and executive accountability. By month 6, all board members should complete a formal orientation or refresher training on governance expectations, fiduciary duties, and strategic oversight responsibilities. By month 9, the organization should adopt a board calendar that schedules regular review of strategy, results, finances, and risk. The measurable target should be 100% board participation in

governance training and adoption of updated governance documents within the implementation period. Required resources include board development time, facilitation support if needed, and access to governance training materials. This recommendation is relevant because stronger governance enhances strategic discipline and reduces dependence on informal leadership. It is also achievable because it builds on existing board structures rather than requiring a full governance redesign.

The third recommendation is for leadership to develop and implement a workforce and knowledge continuity plan within 12 months to strengthen internal capability, reduce reliance on tacit knowledge, and support strategic resilience. The findings showed that several important processes depended on individual know-how rather than documented systems, which increased vulnerability in areas such as onboarding, communication, recognition, and routine operations. This issue is especially important from a RBV perspective because organizational knowledge, workforce capability, and relational trust are strategic resources only when they are developed and retained in usable forms (Ávila et al., 2024; Ferreira & Ferreira, 2025). De Oro (2025) also emphasized that nonprofit resilience depends on more than financial survival. It depends on how well organizations align people, structures, and relationships to maintain functioning during disruption. In a similar way, Seo et al. (2026) found that nonprofits improve long-term adaptability when they build systems that support both stable execution and innovation.

To implement this recommendation, the executive director and designated managers should identify mission-critical roles, recurring processes, and high-risk

knowledge gaps during the first 90 days. During the next 90 days, each manager should document essential procedures for their function, including onboarding steps, scheduling routines, communication practices, reporting processes, and volunteer or workforce support activities. By month 9, leadership should introduce a cross-training plan for key roles and a simple knowledge repository, such as a shared digital folder containing process guides, templates, and checklists. By month 12, the organization should evaluate whether at least 80% of mission-critical processes are documented and whether at least two staff or volunteer leaders can perform each essential function. Resources required include staff time for documentation, basic digital storage tools, and time for cross-training and review. This recommendation is measurable, achievable, and directly relevant to the study findings because it turns informal know-how into a durable organizational capability.

The fourth recommendation is for leadership to adopt a structured annual strategy and innovation review process within the next fiscal year to improve adaptive capacity while maintaining operational stability. The findings showed that the organization had strong service commitment and clear mission intent, but limited formal systems for reviewing strategic options, testing improvements, and connecting new opportunities to measurable outcomes. Current literature authors suggested that nonprofits perform better when they can balance the exploitation of existing strengths with the exploration of new approaches, a capability described as nonprofit ambidexterity (Seo et al., 2026). This idea aligns with Baldrige-based excellence models, which emphasize systematic improvement and strategic alignment, and with RBV scholarship, which highlighted the importance of

building dynamic internal capabilities rather than relying only on existing assets (Alanazi, 2025; Ávila et al., 2024; Baig et al., 2025). Implementing an annual strategy and innovation review process can help leadership evaluate emerging opportunities, align improvements with organizational capabilities, and support more adaptive long-term decision-making.

To implement this recommendation, the CEO should schedule an annual strategic review retreat with senior leaders and selected board members within the next 12 months. During that process, leaders should review results from the new performance measurement system, assess changing stakeholder needs, identify one to three improvement priorities, and select at least one pilot initiative for testing over the following 6 months. Each pilot should include a clear owner, expected outcome, resource estimate, and review date. Possible examples include a new stakeholder communication process, a revised onboarding model, or a digital process improvement initiative. The measurable target should be completion of one annual strategic review and at least one evaluated pilot initiative within the first implementation cycle. Resources required include planning time, basic facilitation support, and leadership attention to follow-through. This recommendation is relevant because it helps the organization move from reactive change to deliberate adaptation.

Collectively, these recommendations contribute to business practice by translating the study findings into practical, evidence-based actions that nonprofit leaders can implement to strengthen performance and sustainability. The recommendations do not ask the organization to abandon its mission-driven culture. Instead, they support leaders

in formalizing the systems that allow that culture to produce reliable, measurable, and repeatable results. The broader implication for professional practice is that nonprofit effectiveness improves when leaders treat governance, measurement, workforce capability, and strategic adaptation as interconnected management responsibilities rather than separate tasks. For the research-scholar community, these recommendations reinforce recent scholarship showing that nonprofit resilience and effectiveness are built through systems alignment, not isolated interventions (Baig et al., 2025; De Oro, 2025; Seo et al., 2026). In this sense, the findings and recommendations of this single case study extend current knowledge by demonstrating how the BEF and resource-based logic can be integrated to guide practical nonprofit improvement.

Implications for Social Change

Nonprofit organizations play an important role in supporting communities by delivering services that improve safety, education, and social wellbeing. The findings of this consulting capstone qualitative single case study suggested that strengthening internal leadership systems, governance practices, performance measurement, and workforce structures can improve not only organizational performance but also broader social outcomes. Research has shown that resilient nonprofit organizations contribute to stronger communities when mission commitment is supported by effective leadership, governance, and operational practices (De Oro, 2025; Seo et al., 2026). When nonprofit organizations develop more structured systems for decision-making, measurement, and operational coordination, they are better positioned to sustain services that individuals and communities depend on.

One implication for positive social change is improved service reliability for communities served by nonprofit organizations. The findings showed that the TSO delivers trusted training and response services valued by community stakeholders. However, informal operational systems and limited performance measurement may constrain the organization's ability to sustain or expand these services. Implementing standardized processes and structured measurement systems can strengthen service consistency and improve accountability for outcomes. These improvements help ensure that critical training and preparedness programs remain reliable and accessible, supporting community resilience.

A second implication involves strengthening governance and leadership accountability within nonprofit organizations. Effective governance supports responsible stewardship of resources and improves strategic decision-making. The findings suggested that although leadership commitment at TSO was strong, several governance practices relied on informal processes. Strengthening governance structures, clarifying board responsibilities, and improving oversight practices can enhance transparency and accountability. Research indicated that engaged nonprofit boards play an important role in maintaining mission alignment and responsiveness to stakeholder needs (Renz et al., 2022). Stronger governance, therefore, contributes to more effective institutions that serve communities responsibly.

A third implication for social change relates to workforce sustainability and knowledge continuity within nonprofit organizations. Many nonprofits depend on staff, volunteers, and community partners whose experience supports mission delivery. The

findings showed that several operational processes relied on tacit knowledge rather than documented systems. Developing structured onboarding processes, documenting operational procedures, and supporting workforce engagement can improve organizational stability and preserve institutional knowledge. These practices strengthen nonprofit capacity to sustain services and respond to evolving community needs.

Overall, this single case study highlighted how strengthening organizational systems in nonprofit institutions can generate broader social benefits. When leaders adopt structured governance, leadership practices, and data-informed decision-making, they build organizations that are more resilient, accountable, and capable of sustaining community services. For the research-scholar community, the study also shows how frameworks such as the BEF and the RBV can guide practical improvements that enhance nonprofit effectiveness and long-term community wellbeing.

Conclusion

The purpose of this qualitative consulting single case study was to explore how the TSO manages leadership, workforce, operational, and performance systems to support mission fulfillment and organizational effectiveness. Guided by the BEF and the RBV, the study evaluated how organizational practices influence performance and long-term sustainability within a nonprofit environment. Data were collected through semistructured interviews with organizational leaders, internal organizational documents, and publicly available information. Triangulating these sources supported a comprehensive evaluation of TSO's leadership practices, operational systems, and

workforce dynamics. The analysis focused on identifying patterns aligned with the BEF categories and assessing how these practices influenced organizational results.

The findings indicated that TSO demonstrates strong mission alignment, trusted community relationships, and consistent delivery of training and response services. Leadership commitment and workforce dedication contribute to stable organizational performance. However, several operational processes rely on informal practices and limited performance measurement systems, which may constrain scalability and long-term sustainability. The recommendations developed in this single case study focused on implementing structured performance measurement systems, strengthening governance accountability, improving workforce knowledge continuity, and establishing formal strategy review processes. Strengthening these organizational systems can support more consistent decision-making, improved accountability, and sustained community service delivery.

Overall, this consulting capstone qualitative single case study highlighted the importance of aligning mission-driven leadership with structured governance, workforce, and performance management systems. When nonprofit organizations strengthen these internal capabilities, they improve organizational resilience and enhance their ability to deliver reliable services that benefit the communities they serve.

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Appendix A: Interview Questions and Interview Protocol

Organization Profile

1. What are your key organizational characteristics?
2. What is your organization's strategic situation?

Leadership

3. How do your senior leaders lead the organization?
4. How do you govern your organization and make societal contributions?

Strategy

5. How do you develop your strategy?
6. How do you implement your strategy?

Customers

7. How do you listen to your customers and determine products and/or services to meet their needs?
8. How do you build relationships and enhance the customer experience?

Measurement, Analysis, and Knowledge Management

9. How do you measure, analyze, review, and improve organizational performance?
10. How do you manage your information and your organizational knowledge assets?

Workforce

11. How do you build an effective and supportive workforce environment?
12. How do you engage your workforce for retention and high performance?

Operations

13. How do you design, manage, and improve your key products and/or services and work processes?
14. How do you ensure effective management of your operations?

Project Results

15. What are your product and/or service and process performance results?
16. What are your customer-focused performance results?
17. What are your workforce-focused performance results?
18. What are your senior leadership and governance results?
19. What are your results for financial and marketplace performance and strategy implementation?

Interview Protocol

The interview protocol outlined the standardized steps I followed during the semistructured interviews. The purpose of these interviews was to collect qualitative data addressing strategies to improve operational efficiency, instructor retention, and revenue diversification.

Setting and Preparation

I conducted each interview virtually, lasting approximately 45–60 minutes. Each session was audio-recorded with participant consent. Before initiating this project, I emailed participants an invitation containing the consent form and study overview. At the start of each session, I confirmed consent and reminded participants of their right to decline any question or withdraw at any time without penalty.

Interview Administration

I began by restating the study purpose and confidentiality procedures. The questions followed a semistructured format that encouraged open-ended discussion. I used follow-up prompts such as “Could you elaborate on that?” or “What factors influenced that decision?” to gain deeper insights and clarify meaning when needed.

Post-Interview Procedures

After each interview, I thanked participants, transcribed the recordings verbatim, and conducted member checking by sending brief summaries for confirmation. I anonymized all transcripts by replacing identifying details with participant codes (e.g., P1, P2). All materials were stored in encrypted, password-protected files and retained for five years in compliance with Institutional Review Board (IRB) requirements.

Researcher Reflection

Following each session, I wrote brief analytic memos documenting key impressions and emerging themes to support reflexivity and enhance data credibility.

Appendix B: Service Order Agreement

(no edits permitted)

Student Name (“Student”):	Organization Name (“Organization”):
Address:	Representative:
Email:	Title:
Phone:	Address:
	Email:
	Phone:

Project Proposal

It is the intent of the above-named Parties to work together to provide the Student with an opportunity to complete a Walden University Doctor of Business Administration capstone project (the “Project”). This Project Proposal sets forth the responsibilities of the Parties and the scope of the Project.

Scope of Project

[In the following table, the student will enter the mutual expectations and outcomes/deliverables for the Project.]

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

Total	
Services Summary	Length of Engagement From date: To date:

Terms of Agreement and Party Responsibilities:

I. Confidentiality

- A. In all reports (including drafts shared with peers and faculty members), the Student is required to maintain the Organization's confidentiality by removing names and key pieces of information that might disclose the identity of individuals or the Organization, or inappropriately divulge proprietary details concerning the Organization.
- B. If the Organization wishes to publicize the findings of this project, it may do so at its discretion.
- C. The Student will not use data obtained from the Organization for any purpose other than the Project outlined in this Agreement.
- D. The Organization may require the Student to sign a Non-Disclosure Agreement if desired by the Organization.

II. Publication

- A. The Student will publish the Project case study in ProQuest as a doctoral capstone. The Organization's identity and participant identifiers will be withheld. The Organization will have no right to any intellectual property developed as a result of this Agreement because of the Organization's voluntary role this Project.
- B. Any publications or presentations beyond the doctoral program's required capstone must be negotiated separately between the Organization and the Student.

III. Scope of Project Data

- A. The Project case study will be based upon audio-recorded interviews with non-vulnerable adults on the topic of the Organization's business operations, review of public records, and review of internal records/documents related to the Organization's operations that the Organization deems appropriate for sharing with the Student.
- B. Upon request, audio recordings of the interviews as well as full transcripts will be shared with any interviewee, at which time the Student will provide an opportunity for the interviewee to clarify statements made during the interview.
- C. Transcripts with participant and Organization identifiers withheld, may be shared with the Student's university faculty, peer advisors, and site leadership.
- D. Video recordings of the interviews are not permitted.

IV. Organization Responsibilities

- A. The Organization reserves the right to withdraw from the Project at any time.

- B. The Organization agrees to provide training to the Student concerning any Organization-specific regulatory or legal requirements, including Organization confidentiality processes and procedures, that the Student will need to comply with during the Project.
- C. The Organization's signatory below has the authority to bind the Organization to the terms of this Agreement.

V. Student Responsibilities

- A. The Student has the right to withdraw from this Agreement at any time.
- B. The Student will obtain interviewees' consent to conduct the interview and record the interview. As the interview is voluntary, the Student agrees to stop conducting the interview upon the interviewee's request.
- C. The Student is responsible for understanding and complying with all of the Organization's policies and regulatory requirements.
- D. The Student agrees to abide by the [Ethical Standards for Doctoral Student Consulting Relationship](#).

VI. Miscellaneous

- A. The Organization and the Student agree to comply with all applicable laws and regulations, including laws prohibiting discrimination.
- B. The Organization and the Student will evaluate the Project at mutually agreeable times, planning for its continuous improvement, making such changes as are deemed advisable and discussing problems as they arise concerning this Project.
- C. The Parties agree that they are independent contractors, and that the Student is not and will not be considered an employee of the Organization or any of its subsidiaries or affiliates by virtue of the Student's engagement in this Project and shall not as a result, be entitled to compensation, remuneration or benefits of any kind.
- D. This Agreement is nonexclusive. The Organization reserves the right to enter into similar agreements with other consultants/students and universities.

For Organization:

Name:

Date:

Title:

Signature:

For Student:

Signature:

Date:

Appendix C: AI Engagement Log

This appendix documents the ways in which generative artificial intelligence (AI) tools were engaged during the development of this doctoral research project. Walden University requires transparent disclosure of all AI involvement to ensure academic integrity and demonstrate that the doctoral candidate maintains ownership of critical thinking, analysis, and scholarly contributions.

The AI tools referenced below were used solely as drafting assistants, organizational aids, and formatting tools. At no time were AI outputs presented as final scholarly work without substantial revision, synthesis, and critical engagement by the researcher. All ideas, analyses, and conclusions remain the original work of the doctoral candidate.

AI Engagement Record

Date Range	Section of Work	Tool Used	Type of Engagement	Researcher's Application of Output
July–Aug 2025	Section 1: Project Foundation	ChatGPT (GPT-5)	Drafting support; APA 7 formatting suggestions	Used AI to help refine clarity of the problem statement, align research question wording with Walden's qualitative consulting single case study guidelines, and ensure headings matched APA 7th edition. All drafts were edited extensively by me before inclusion.
Aug 2025	Literature Review (Business Topic & Business Problem Scholarship Evidence)	ChatGPT (GPT-5)	Organization of MEAL plan (Main idea, Evidence, Analysis, Link); paraphrasing scholarly sources;	AI was used to suggest organizational structure for synthesis paragraphs and to reframe evidence for clarity. All sources were read

Date Range	Section of Work	Tool Used	Type of Engagement	Researcher's Application of Output
			synthesis mapping	and verified independently by the researcher. Citations were checked against APA 7th standards.
Oct 2025	Section 2: Primary and Secondary Industry Data Analysis	ChatGPT (GPT-5)	Drafting methodology language; aligning with Qualitative Consulting Single Case Study	Researcher relied on AI to generate initial draft language for describing qualitative design and strategies for credibility. Researcher critically reviewed and adapted all text to match
January 2026–March 2026	Drafting Support	ChatGPT (GPT-5)	Iterative drafting, feedback, and refinement	AI was used as a collaborative tool to test phrasing, brainstorm structural improvements, and generate multiple versions of text for comparison. Final language and intellectual contributions are the researcher's own.
July 2025 – Jan 2026	Literature review and background research	Perplexity AI	Research discovery and source identification	Used the tool to identify potential peer-reviewed articles and recent scholarly publications related to nonprofit

Date Range	Section of Work	Tool Used	Type of Engagement	Researcher's Application of Output
				governance, performance measurement, and organizational excellence frameworks. All sources were independently reviewed, verified through academic databases, and selected based on relevance and credibility before being incorporated into the study.
January 2025 – Mar 2026	Full manuscript editing and proofreading	Grammarly	Grammar review, clarity suggestions, and writing mechanics	Used the tool to identify grammar, punctuation, and sentence clarity issues. Suggestions were reviewed and selectively applied. All content, interpretation, and scholarly arguments remained the responsibility of the researcher.
August 2025 – Mar 2026	Reference list and citation verification	ReciteWorks	Citation and reference cross-checking	Used the tool to verify consistency between in-text citations and the reference list and to identify missing or unmatched references. All corrections were

Date Range	Section of Work	Tool Used	Type of Engagement	Researcher's Application of Output
				reviewed manually and adjusted to comply with APA 7th edition formatting requirements.

Safeguards for Academic Integrity

1. **Verification of Sources:** All references suggested by AI were independently located and confirmed through Walden University's library and databases.
2. **Critical Ownership:** AI-generated drafts were treated as starting points only. I maintained full responsibility for interpretation, synthesis, and final wording.
3. **APA Compliance:** Formatting assistance from AI was verified against APA 7th edition standards.
4. **Transparency:** This log documents the extent of AI engagement, as required by Walden's doctoral research project policies.

Statement of Responsibility

I affirm that AI tools were used only to support clarity, structure, and organization, not to replace critical analysis, synthesis, or original thought. All findings, conclusions, and scholarly contributions are the intellectual work of the doctoral candidate.