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Attraction and Retention of Individual Donor Funding in Nonprofit Organizations

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Walden University

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Walden University

College of Management and Technology

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Andria Coleman

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Walden University
2018

Abstract

Attraction and Retention of Individual Donor Funding in Nonprofit Organizations

by

Andria Coleman

MBA, Howard University, 2015

BBA, Pace University, 1994

Consulting Capstone Study Submitted in Partial Fulfillment

of the Requirements for the Degree of

Doctor of Business Administration

Walden University

August 2018

Abstract

Individual donors are an important source of revenue for nonprofit organizations. However, there is limited information on the attraction and retention of individual donors in nonprofit organizations. This single-case study addressed strategies 3 nonprofit leaders in the Northeast United States use to attract and retain individual donors. The conceptual framework was Kaplan and Norton's strategy map and the 2015-2016 Baldrige Excellence Framework used to evaluate organizational performance. Data collection included semistructured interviews; review of company documents; analysis of data available via GuideStar, an online provider of information on U.S. nonprofit organizations; analysis of data available about U.S. agencies; and review of data and information from other publicly available sources with information on nonprofit organizations. Data analysis included coding of collected data and use of thematic analysis. Four themes emerged from the study: strength in fundraising processes, operational alignment of strategy, opportunities in documentation of processes, and systematic evaluation of programs' effectiveness and organizational learning. Findings may assist nonprofit leaders in aligning organizational strategies with key processes and focusing efforts on the achievement of organizational goals. Nonprofit leaders may use the results to improve access to funds from individual donors and to create valuable community services such as increased access to schools and affordable housing in underserved urban areas.

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Dedication

To my husband and my son. Thank you both for your belief in me and support throughout this journey. You are my joy, and I love you both. To my grandmother who dropped out of school to stay home and raise her younger siblings, thank you for showing me the meaning of sacrifice. I am a product of one of those siblings. Miss Ida, your sacrifice was not in vain; I love you, and I honor you.

Acknowledgments

Thanks to my heavenly Father who knew me before I knew myself and mapped out my path. Thank you to my husband and our son. I could not have done this without your unwavering belief and love. You are my biggest champions, and I love you both. To my family, thank you for providing the motivation and determination to be all I can be. To my chair, Dr. Janice Garfield, words cannot express my gratitude to you. Thank you for your patience, guidance, teachings, and kindness. I learned so much from you, and I hope to inspire others as you have inspired me. To my committee member, Dr. Dina Samora, and my university reviewer, Dr. Karin Mae. Thank you both for your valuable feedback, insights, and encouragement in the completion of this journey. Thank you, Dr. Freda Turner, pioneer of the Walden University's DBA consulting capstone program. I am proud to be selected among the first group of pilot students and an example of the program's success. Thank you, Dr. Susan Davis, program director of the DBA consulting capstone, for your continued work to sustain and expand the program. The journey continues, and I go forth.

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Section 1: Foundation of the Study

In this study, I explored strategies successful leaders of nonprofit organizations use to generate and maintain funding from individual donors. I used the 2015-2016 Baldrige Excellence Framework (2015) as a tool to conduct a holistic, systems-based review of an assigned client organization. I embedded my exploration of the central research question in this comprehensive assessment of the organization.

Background of the Problem

Sustainability of donors presents a challenge for nonprofit leaders. Nonprofit leaders rely on grants and donations from donors to fulfill their missions and achieve strategic objectives (Omura & Forster, 2014; Waniak-Michalak & Zarzycka, 2015). Market competition resulting from increased growth in the numbers of charitable organizations (Klar & Piston, 2015) can negatively affect the attraction and retention of donors and may lead to the loss of donors. Viability for nonprofit leaders depends on consistent contributions from donors, and the implementation of strategies to attract and retain donors is essential.

Previous research focused on strategies nonprofit leaders use to maintain their revenue streams including revenue diversification and the management of funding sources (Froelich, 1999; Kearns, Bell, Deem, & McShane, 2012; López de los Mozos, Duarte, & Ruiz, 2016). Research on the attraction and retention of individual donors is limited, even though their contributions to nonprofit organizations is significant. In 2016, individual donations totaled \$281 billion, a 3.9% increase from previous years (Giving

USA, 2017). This amount surpassed donations received from both corporations and foundations (Giving USA, 2017).

Hou, Zhang, and King (2016) identified a relationship between the behaviors of individual donors and future giving intentions. The authors concluded that individual donors' trust damage is indirectly related to giving intentions based on perceived benefits and risks. Ramanath (2016) addressed the importance of distinguishing between individual donors' loyalties and retention in strategy development and implementation. By understanding the complex motivations of individual donors, nonprofit leaders may benefit from their contributions in fulfilling organizational missions and achieving goals. Because nonprofit leaders evaluate donor information and make decisions regarding their funding sources and the focus of their fundraising and solicitation efforts (Kearns et al., 2012), information about individual donors may lead to an increase in collected donations.

Problem Statement

Organization leaders must demonstrate financial efficiency and follow normative business practices to meet organizational goals; the same is true for nonprofit leaders in obtaining donor funding (Mitchell, 2015). In 2014, individual donations accounted for over 70% of the donations received by nonprofit organizations; however, donor retention rate was 43% for new and repeat donors (U.S. Department of Labor Statistics, 2016; The Urban Institute, 2015). The general business problem was that loss of individual donors adversely affects nonprofit organizations' operating revenues. The specific business

problem was that some leaders of nonprofit organizations lack strategies to generate and maintain funding from individual donors.

Purpose Statement

The purpose of this qualitative, single case study was to explore strategies successful leaders of nonprofit organizations use to generate and maintain funding from individual donors. Three nonprofit business leaders from the Northeast United States who used successful strategies to generate and maintain individual donor funding represented the target population in this study. Key implications for positive social change included the potential alignment of organizational goals, the creation of value for donors, and leaders' enhanced ability to maintain and improve services that benefit the community.

Nature of the Study

I used the qualitative method for this study. The qualitative method is an inductive, interpretive form of data collection and analysis (Ritchie, Lewis, Nicholls, & Ormston, 2013). Researchers use the qualitative method to gather information about individuals' personal observations and explanations regarding an observed phenomenon (Ritchie et al., 2013). Because the purpose of my study was to explore strategies leaders of successful nonprofit organizations use to generate and maintain funding from individual donors, the qualitative method was appropriate. Researchers use the quantitative method to test hypotheses about relationships or differences among variables (Laher, 2016). I did not test hypotheses regarding the relationships among variables; therefore, the quantitative method was not appropriate for my study. Mixed-methods researchers combine qualitative and quantitative methods to answer research questions

(Venkatesh, Brown, & Sullivan, 2016). I did not use a mixed-methods approach because quantitative data were not needed to answer my research question.

The design I selected for this research was the single case study. In case study research, researchers use multiple sources of data to provide comprehensive accounts of lived phenomena (Morgan, Pullon, MacDonald, McKinley, & Gray, 2016). I used the case study design to collect data from multiple sources to enable others to develop conclusions about the external validity of the study. Researchers use the phenomenological design to explore subjective views of participants' experiences (Matua & Van Der Wal, 2015). Because I did not intend to describe the subjective views of participants' experiences, the phenomenological design was inappropriate for this study. The ethnographic design involves the study of social phenomena (Brown, 2014). Because I did not seek to understand a social phenomenon, the ethnographic design was inappropriate for this study.

Research Question

The overarching research question was the following: What strategies do leaders of successful nonprofit organizations use to generate and maintain funding from individual donors?

Interview Questions

1. What strategies do you use to generate and maintain funding from individual donors?
2. How do you assess the effectiveness of the strategies to align financial performance, organizational goals, and individual donors' expectations?

3. What methods or processes do you use to transform your strategies to efficiently help generate and maintain funding from individual donors?
4. What strategies do you use to promote employee learning and growth in support of organizational goals and individual donor expectations?
5. What strategies do you use to improve individual donors' satisfaction or value?
6. What else would you like to add not previously addressed?

Conceptual Framework

The conceptual framework I used in this study was the organizational strategy map developed by Kaplan and Norton (2004). Key concepts of the organizational strategy map include how organizational leaders create value through alignment of four perspectives: financial processes, internal/company processes, employee learning and growth, and customers. Organizational leaders can use the organizational strategy map as a guide in creating organizational value by focusing on the four organizational perspectives and achieving competitive advantage (Arthur, Schoenmaker, Hodkiewicz, & Muruvan, 2016). The strategy map was relevant to my research because it provided a framework for understanding the strategies and processes nonprofit leaders use to generate and obtain individual donor funding. The strategy map also enabled me to understand the creation of value for the organization and other stakeholders through the efficient use of organizational resources.

Operational Definitions

Definitions and terms listed in this section apply to business practices and the

leadership of nonprofit organizations.

Competitive advantage: A strategy business leaders use to maximize social, human, and financial capital to outperform their rivals (De Massis, Kotlar, & Frattini, 2015).

Customer value: The maximum quality perceived by the customer for goods and services compared to cost (Kordupleski & Vogel, 2015).

Organization strategy map: A framework organization leaders use to create customer value by focusing on financial processes, internal processes, employee learning and growth, and customers (Kaplan & Norton, 2004).

Assumptions, Limitations, and Delimitations

Assumptions

Assumptions are aspects of the study the researcher holds true (Ellis & Levy, 2010). I assumed that participants had expertise in the management of nonprofit organizations and willingly participated in the study. Sutton and Austin (2015) noted that researchers explore participants' experiences and use this understanding to inform and build on narratives during the interviewing process. I assumed that participants' responses during the interview process accurately reflected their knowledge and experiences.

Limitations

Limitations are the limits of the research design (Marshall & Rossman, 2014). One limitation of this study was the choice of the single case study design; results may not be generalizable to a larger population. The single case study design is used to

describe and understand the context of the phenomenon using a single firm with attributes that inform the phenomenon (Gaya & Smith, 2016).

Delimitations

Delimitations are identified boundaries of a study (Ellis & Levy, 2010). There were two delimitations in this study: location and population. The scope of the study included nonprofit leaders in the Northeast United States. The population in the study was nonprofit leaders from a single nonprofit organization who had experiences with individual donor funding.

Significance of the Study

Findings from this study may assist business leaders in aligning their business objectives with those of their stakeholders, workforce, and donors to achieve competitive advantage. Effective business practices, such as management of intangible assets and the incorporation of multiple organizational goals, have the potential to assist nonprofit leaders in fulfilling their mission statement and meeting the needs of their communities. Nonprofit leaders may use donated funds to improve schools, neighborhoods, and social services. Efficient business practices may result in increased revenues, reduced costs, and additional resources for nonprofits to expand the number and scope of their services and effect positive social change in their communities (Stephan, Patterson, Kelly, & Mair, 2016).

A Review of the Professional and Academic Literature

The literature review is a key component in the development of the research idea. Researchers use the literature review to document current knowledge and identify gaps in

the area of research (Ritz, Brewer, & Neumann, 2016). In this qualitative case study, I explored strategies successful leaders of nonprofit organizations use to generate and maintain funding from individual donors. Central to the research topic was the conceptual framework of the Balanced Scorecard performance management tool as a measurement of nonprofit organizational performance. To retain and attract donors, nonprofit leaders' acumen in service management and value creation are rooted in effective performance measurements and strategy execution.

Performance measurements are necessary components in nonprofit management. Nonprofit leaders use performance measurements to measure value creation of services in the determination of programs' effectiveness and efficiencies (Lee & Nowell, 2015; Polonsky, Grau, & McDonald, 2016). Helmig, Hinz, and Ingerfurth (2015) assessed value prioritization and implementation in nonprofit organizations and demonstrated similarities with for-profit organizations. The authors highlighted the importance for nonprofit leaders to use other strategic options to sustain operations. Limitations of the use and implementation of performance measurements may exist based on organizational knowledge, systems, and skills (Polonsky et al., 2016). The Balanced Scorecard is a strategic management tool leaders use to measure and align organizational vision and strategies (Gawankar, Kamble, & Raut, 2015).

The concept of balance involves the alignment of tangible and intangible assets to overcome singular reliance on financial measurements (Kaplan & Norton, 2004). Since its inception, the Balanced Scorecard has evolved to include a wider range of measurement applications in fields such as education, health care, and government in

addition to applications across industries (Gawankar et al., 2015; Lira & Naas, 2015; Okongwu, Brulhart, & Moncef, 2015; Ozmantar & Gedikoglu, 2015; Perramon, Rocafort, Bagur-Femenias, & Llach, 2016; Rahimnia & Kargozar, 2016; Rosa, Reis, & Vicente, 2016; Smith & Loonam, 2016). I explored strategies nonprofit leaders use to obtain and retain individual donors through the lens of performance management using the Balanced Scorecard. Understanding the importance of performance measurements and how these measurements relate to donor funding may assist nonprofit leaders in quantifying performance outcomes and value creation in services provided. In addition, use of the Balanced Scorecard may inform current practices in nonprofit management and may contribute to nonprofit growth and sustainability.

Approach to the Literature Review

I used the Emerald Insight, Sage, Science Direct, and ProQuest databases to gather data and compose the literature review. Results obtained from searching these databases allowed me to compile and analyze literature on the Balanced Scorecard performance measurement tool. I was able to gain insight into how nonprofit organization leaders can develop strategies to retain and attract individual donors using the Balanced Scorecard as a performance measurement strategy in the creation of organizational value.

Key word searches in the literature review included *balanced scorecard*, *value creation* and *financial*, *customer*, *nonprofit*, *donors*, *learning* and *growth*, and *performance measurement*. Literature sources included peer-reviewed journals and seminal works, of which 85% (57) were published within 5 years of the study. Table 1 shows the details of literature review sources.

Table 1

Literature Review Sources

Types	Total	Ranges:
Peer-reviewed articles	211	Within 5 years – 179
		85%
Seminal works	5	15% of total

The target population in this study were leaders from a nonprofit organization in the Northeast United States who are implementing strategies to attract and retain donors. Implications for positive social change for nonprofit leaders include improving access to donated funds and using these funds to improve schools, neighborhoods, and social services that benefit communities.

Balanced Scorecard

Competition, changes in knowledge, and globalization promote the need for organizational adaptation and measurement of intangible assets such as knowledge and innovation (Dickel & de Moura, 2016). Dickel and de Moura (2016) explored the importance of measurements of these intangible assets and challenges associated with measurements. The use of a systematic approach to performance measurement, such as the Balanced Scorecard, allows leaders to bridge the gap between current and next levels of organizational performance. Achievement of next-level performance involves the use of appropriate performance measurements. Melnyk, Bititci, Platts, Tobias, and Andersen (2013) explored the effectiveness of performance measurements and concluded that performance measurements were effective when they aligned with the current

organizational environment. Riratanaphong and van der Voordt (2015) argued that prioritization of performance measurements and corresponding key performance indicators was a necessary step in selecting the appropriate organizational performance measurements. Use of performance measurements also provides valuable data on organizational performance to key stakeholders such as current and future donors.

Introduced in the early 1990s, the Balanced Scorecard is used to quantify value creation and strategies from tangible and intangible assets (Anjomshoae, Hassan, Kunz, Wong, & de Leeuw, 2017; Ayoup, Omar, & Abdul Rahman, 2016; Kaplan & Norton, 2004; Valmohammadi & Sofiyabadi, 2015). Organizational vision and strategies for value creation measurements are based on outcomes in four distinct areas of organizational performances: financial processes, customers, employee learning and growth, and internal business processes (see Table 2). To facilitate implementation of the Balanced Scorecard, Kaplan and Norton (2004) developed the strategy map highlighting the interconnectedness of value creation, strategy execution, alignment, and intangible assets. Balanced Scorecard and strategy map refer to the same performance measurements in the creation of organizational value through alignment of tangible and intangible assets (Kaplan & Norton, 2004).

Table 2

Perspectives on the Balanced Scorecard

	Financial	Customer	Internal process	Learning and growth
Perspectives of the balanced scorecard represent different areas of value creation for the organization.	Organizational efficiency through effective asset management and cost containment.	Customer value creation through quality improvement.	Strategy implementation in operations, customer satisfaction, innovation, and corporate social responsibility.	Leadership development of organizational competencies and capabilities to support organization mission and vision.

Appropriate use of performance measurements affects outcome results. Dickel and de Moura (2016) identified several performance measurement models with similar causal relationship structures such as Baldrige, European Foundation for Quality Management, and Key Performance Indicators. However, there were multiple applications of the Balanced Scorecard in management control and performance management (Dickel & de Moura, 2016). Hansen and Schaltegger (2016) identified variations of and expansion in the use of the Balanced Scorecard in sustainability and strategy implementation. Sustainability represented a key area in the implementation of the Balanced Scorecard (Hansen & Schaltegger, 2016). Wang, Chang, Williams, Koo, and Qu (2015) supported use of the Balanced Scorecard as a systems approach in sustainable design manufacturing evaluation. Xia, Yu, Gao, and Cheng (2017) developed a modified Balanced Scorecard as an appropriate decision-making model in the assessment of sustainable technology selection for the supply chain. Journeault (2016) concluded that the Balanced Scorecard supported corporate sustainability strategies.

Wake (2015) examined the use of the Balanced Scorecard in the control of knowledge worker environments. Wake concluded that the Balanced Scorecard was a necessary component in the alignment of strategic organizational objectives and work within the organization. Punniyamoorthy and Murali (2008) researched value of the Balanced Scorecard and concluded that the Balanced Scorecard provided value to organizations as a benchmarking tool in the determination of strategy achievement.

Nonprofit Organizations

Kaplan and Norton's (2004) original concept of the Balanced Scorecard was intended to overcome shortcomings of performance measurements that focused solely on financial measurements, and to broaden the use of the Balanced Scorecard to organizations where other measures, including financial measurements, were applicable (e.g., nonprofit organizations). Nonprofit organizations' goals focused on community service and measurement of the positive impact of services (Soysa, Jayamaha, & Grigg, 2016). Difficulties existed with the implementation of appropriate measures of performance in nonprofit sectors. Soysa et al. (2016) noted that variations in the range of funding sources, environmental changes, complexities, and transparency in operations contributed to the need for appropriate measurement of operational efficiency in nonprofit organizations. Kim and Kim (2016) explored key drivers in nonprofit decision-making and concluded that economic trends and governmental policies were the main drivers of resources allocation in nonprofit organizations.

Donor funding plays a key role in the allocation of resource and value creation in nonprofit organizations. Liang and Renneboog (2017) studied the source of corporate

donations, value creation, and organizational performance and concluded that charitable donations positively affected financial performance and the creation of value for the firm. In 2016, individual donors contributed \$389.05 billion in donations (Giving USA, 2016) and were the largest contributors of charitable donations in the United States totaling over 72% of annual income. Faulkner, Romaniuk, and Stern (2016) studied the habits of desirable donors and ways nonprofit leaders can increase donor revenues. The two main strategies Faulkner et al. identified were expanding the proportion of donors and increasing frequencies of donations. The examination of donor behaviors provided useful information to nonprofit leaders (Faulkner et al., 2016). According to Faulkner et al., one-time donors represented the largest portion of charitable donors, a finding also supported by Ramanath (2016). Faulkner et al. suggested that nonprofit leaders should implement strategies that remind donors to continue to support this important group.

The actions of donors and reasoning behind charitable giving are multifactorial. Wong and Ortmann (2016) studied the selection process of donors and concluded that a relationship existed between the price of giving and perceived benefits from giving. High costs associated with fundraising efforts may have a negative effect on giving and may create the need for increased efficiencies in nonprofit operations (Wong & Ortmann, 2016). The ease of online giving and advances in social network sites positively affected the decisions of donors (Sura, Ahn, & Lee, 2017). In addition to ease of use, the creation of a platform of social network sites that supported relationships and communication among online users was an important driver of online donations (Sura et al., 2017). Hou et al. (2016) explored behaviors of individual donors and trust damage. Hou et al.

established three stages of giving (pregiving, giving, and postgiving) and explored the effects of trust damage during each stage. Hou et al. concluded that post contributions individual donors evaluated organizational operations via actual performance and perceived benefits, which affected future charitable intentions.

Martello, Watson, and Fischer (2016) examined the use of the Balanced Scorecard in a nonprofit organization and stated that leaders gained a better understanding of the importance of strategic planning beyond simple long-range planning processes. Martello et al. supported the use of the Balanced Scorecard by underscoring the importance of the interconnectedness between organizational segments and organizational strategic plans. Implementation of performance measurement systems with a focus on singular organizational segments may not prove beneficial in the determination of overall organizational performance focusing on financial and nonfinancial elements of performance (Martello et al.).

Nonprofit organizational leaders align their purposes and mission statements to organizational performance. Pandey, Kim, and Pandey (2017) explored the importance of nonprofit mission statements and organizational performance in arts and cultural organizations. Pandey et al. determined that mission statements' featuring of activities had a positive effect on performance, demonstrating a link between performance and strategy implementation. Creamer and Freund (2010) noted the importance of a board-balanced scorecard in the improvement of corporate performance. Creamer and Freund described a board-balanced scorecard as an important contribution to organizational strategy consisting of data regarding board operations and information to monitor the

structure and performance of board members. Measurement of nonprofit board governance can provide information on the effectiveness of board governance on organization performance.

Evolution of the Balanced Scorecard

Evolution of the Balanced Scorecard reflected ongoing business changes and the need for broader applications of the scorecard across sectors. Perkins, Grey, and Remmers (2014) identified three key changes in the evolution of the scorecard with the intent of simplifying applications and implementations for practitioners. Early concepts of the balanced scorecard focused organizational efforts on the interconnectedness of the four perspectives, financial, internal, customer, innovation and learning with a minor focus on goal setting timeframes (Perkins et al., 2014). Albertsen and Lueng (2014) expanded the classification of Balanced Scorecard by Speckbacher, Bischof, and Pfeiffer (2003) and identified three classifications of performance measures as Balanced Scorecards in support of Kaplan and Norton. The first phase included non-financial measures related to customers, internal processes, and learning and growth. Building on this first phase, the author identified the second classification in the cause and effect relationship among the perspectives. The third classification identified involved linkage to organizational compensation (Albertsen & Lueng, 2014).

Missing from Kaplan and Norton's original performance measurement was the connection between organizational strategy and performance measurements. In the next phase of evolution, Kaplan and Norton (2004) introduced the strategy map, an additional tool that enabled leaders to visualize organization strategies with the four perspectives

and translate them into actionable items for employees (Perkins et al., 2014; Hoque, 2014). Unchanged throughout the evolution of the scorecard was the cause and effect relationship between the four perspectives and performance outcomes. To define organizational outcomes, the current phase in the evolution of the Balanced Scorecard focused on the future state of the organization and included a destination statement (see Table 3). Having a definitive destination statement was a way for a leader to align measurement tools with organizational strategies and outcomes Perkins et al.

Table 3

Evolution of Balanced Scorecard

Interconnectedness between perspectives	Strategy map	Destination statement
1992 – 1996	2000-2004	2004 -
Focus on interactions between financial, customer, internal processes, learning and growth	Effects of intangible assets on performance.	Evolution from performance measurement tool to performance measurement system.

Note. Evolution of the balanced scorecard. Adapted from Perkins, M., Grey, A., & Remmers, H. (2014). What do we really mean by “balanced scorecard”? *International Journal of Productivity and Performance Management*, 63, 148-169. doi:10.1108/IJPPM-11-2012-0127.

Perspectives on the Balanced Scorecard

Value

Value creation is the objective of organizational operations. Jensen (2001) noted that competing organizational objectives posed a challenge to organization leaders and necessitated the need to practice purposeful strategy execution. The concept of value maximization was an important area of focus in the stakeholder theory, which held that

leadership decisions were influenced by the interests of stakeholders including donors, customers, communities, and government (Jensen, 2001; Bento, Mertins, & White, 2017). Stakeholders' engagement and involvement in the decision-making process increased accountability and provided multiple perspectives resulting in sustainability and longevity of processes and results (Colvin, Witt, & Lacey, 2016). The Balanced Scorecard and the stakeholder theory highlighted the importance of stakeholders and were beneficial to organizational leaders in the identification of drivers of shareholder value (Jensen, 2001). Tantalo and Priem (2014) explored synergistic value creation for multiple stakeholders integrating organizational strategy and the stakeholder theory. Synergistic stakeholder value occurred when strategic actions created value for multiple stakeholders without reduction in current stakeholders' value (Tantalo & Priem, 2014).

The authors identified three methods in the creation of synergistic stakeholder value, increasing stakeholder utility without reducing value among other stakeholder groups, identifying complementary needs across stakeholder groups, and sustaining sources of stakeholder synergy. Organization leaders can use performance measurements to evaluate the effectiveness of organizational strategy execution giving equal consideration to multiple stakeholders not just end users of products and services (Tantalo & Priem, 2014). Donaldson and Preston (1995) viewed stakeholder value as intrinsic, requiring equal and separate consideration by managers in the pursuit of organizational objectives. The Balanced Scorecard aligned four distinct areas of consideration in the pursuit of organizational value creation, financial, customer, internal, and, innovation and learning.

Repovienė (2017) explored the complexity of consumer value creation incorporating Kaplan and Norton's concept of value creation. The author noted that value created from intangible assets was indirect, contextual, potential, and interconnected with other assets. Customer value creation involved a synergistic blend of content value and perceived customer value, which included consumer willingness to pay and the level they deem acceptable (Repovienė, 2017).

Financial Perspective

The application of the financial perspective of the Balanced Scorecard in nonprofit organizations differed from for-profit organizations. According to Kaplan and Norton (2004), financial performance defined organizational performance. Value creation occurred from the perspective of shareholders in nonprofit organizations via an increase in funding sources (Martello et al., 2016). Kong (2010) explored modification in the application of the Balanced Scorecard to nonprofit management through a critical analysis and comparison of the literature pertaining to the Balanced Scorecard and intellectual capital. The author assessed the appropriateness of applicability of the modified scorecard in nonprofit organizations in the achievement of organizational outcomes. To note, the interconnectedness of the Balanced Scorecard perspectives may not apply in social services because the end users of organizational services may differ from the providers of funding (Kong, 2010).

The learning and development of employees and volunteers flowed into organizational knowledge and development. Organizational development and knowledge management influenced service efficiencies, improvements in internal processes, and

finally, the creation of customer value. Moore (2000) noted the value of understanding financial performance and use of financial information as a guide for future organization performance. Financial information is important in the development of organizational strategies. According to Moore (2000), organization leaders can use the Balanced Scorecard to understand market position of goods and services and develop strategies to sustain future financial performance and sustainability.

Nonprofit funding sources. Liang and Renneboog (2017) explored the relationship between corporate donations, shareholder wealth, and agency inconsistencies in the measurement of value creation. The authors found positive relationships among charitable donations, organizational performance, and value creation. Funding or revenues streams in nonprofit organizations originated from five main sources, individuals, corporations, foundations, governments, and commercial activities (Lee & Nowell, 2015).

These varying funding sources have different requirements for allocations and applications of funds leading to increasing complexities in financial management and perspectives. Funding sources contributed to the makeup and financial operations of nonprofit organizations. Financial measures of nonprofit financial operations provided important information to leaders and researchers in the evaluation and assessment of organizational well-being (Prentice, 2016) and was a useful indicator of organizational capability to provide services in the community (Lam & McDougale, 2015). Prentice (2015) examined non- financial factors with significant effects on nonprofit financial health. Environmental factors including gross domestic factor, median household income,

and revenue share influenced nonprofit financial health because they affected the frequency and amount of donations and funding bequests to nonprofit organizations (Prentice, 2015; Shea & Hamilton, 2015).

Leaders use Pfeffer and Salancik's resource dependency theory (Hillman, Withers, & Collins, 2009; Froelich, 1999) to inform the decision-making process in nonprofit organizations in the identification of funding sources and implementation of supporting strategies. Decisions by nonprofit leaders to expand funding sources and pursue diversified revenue strategies aligned with the key tenet of the resource dependence theory, that organizational sustainability was dependent on leaders' abilities to attract and maintain valuable resources (Hillman, Withers, & Collins, 2009; Froelich, 1999). The relationship between funding sources in nonprofit organizations required leaders to implement strategies to appropriately manage and assess funding sources. Kearns, Bell, Deem, and McShane (2012) assessed strategies nonprofit leaders used to assess funding sources and identified specific evaluation criteria used by organization leaders. Evaluation criteria included the alignment of funding sources with organization mission, long-term sustainability of sources, and use of sources to maximize organizational resources.

Financial diversity and resilience were markers of sustainability for nonprofit organizations in times of economic stress and downturn. Lin and Wang (2016) noted that nonprofit organizations with secure external funding relationship were able to manage the perception of economic stress, continue revenue generation, and maintain their expense levels. Nonprofit leaders' assessment and evaluation of funding sources were crucial to

organizational sustainability and performance because funding provided the necessary resources to meet the organizational mission. Changes in the economy and the external environment influenced funding sources and highlighted the importance of management of these resources (Kearns, Bell, Deem, & McShane, 2012). Kearns et al. (2012) surveyed nonprofit leaders regarding criteria and assessment strategies used to determine funding sources. The authors found that while achievement of organization mission was important, organizational leaders employed strategies to identify funding sources that led to building and sustaining community relationships. These strategies included the attraction of volunteers and community partners and the sustainability of funding sources (Kearns et al., 2012).

Leaders of nonprofit organizations can increase charitable contributions or funding from individuals and organizations who share their cause and mission (Moore, 2000). Common criteria for funding included risk management, increase in return on effort, and alignment of funds with internal management capacity (Kearns et al., 2012). Based on the literature, there were various opportunities available to nonprofit leaders regarding funding sources and strategies to sustain funding including market-oriented strategies. A rising market-oriented strategy used by large nonprofit leaders included the use of tax-exempt bonds to sustain programs and services (Calabrese & Ely, 2015). The use of tax-exempt bonds allowed investors to receive tax-exempt interest on a taxable debt instrument and a lower cost of capital to the nonprofit borrower (Calabrese & Ely, 2015).

Nonprofit leaders may pursue a diversified funding source strategy to reduce

reliance on a single source of funding, increasing funding sources, achieve autonomy in operations management, and increase resilience in times of economic downturn (Lopez de los Mozos, Duarte, & Ruiz, 2016). Lopez de los Mozos et al. (2016) examined the how changes in the diversification of nonprofit funding sources affected the ability to attract resources. The authors concluded that nonprofit leaders who pursued a diversified funding strategy must have contingencies in place due to the complexities involved in the pursuit of such strategy.

The costs of obtaining funding from different sources may increase administrative and fundraising expenses while diversity in funding sources may reduce financial strains (Lopez de los Mozos et al., 2016). In managing costs, funding and revenue diversification strategies should align with organizational mission and goals. Chikoto and Neely (2014) found that diversification strategies must first support organizational missions. Nonprofit leaders can then concentrate their revenue generating efforts from that point on. In support of complexities involved in the pursuit of funding and revenue diversification, Mendoza-Abarca and Gras (2017) concluded that revenue diversification was beneficial only to newly founded nonprofit organizations that also pursued product and services diversification.

Traditional measurements of nonprofit success or efficiencies included financial indicators. Ecer, Magro, and Sarpca (2016) evaluated nonprofit financial efficiencies as a measurement of overhead ratio, revenue composition, and other organizational variables including location, size, subsector, and age. The authors concluded that traditional nonprofit organizations were more financially efficient compared to other social

enterprises due to the focus on single revenue sources and the optimization of organizational resources.

Nonprofit financial viability. Financial viability for nonprofit organizations leaders ensured continuity of programs and services. Interruptions or reductions in funding can result in cuts or elimination of programs and organization closure (Kim, 2017). The literature does not show a clear consensus regarding the definition of financial vulnerability (de Andrés-Alonso, Garcia-Rodriguez, & Romero-Merino, 2015). However, there were predictive ratios that influenced program continuity such as efficiency. Efficiency in nonprofit organizations should focus on operational efficiency or low overhead and large equity balance in the achievement of organizational mission and objectives (Kim, 2017).

To accurately predict nonprofit financial vulnerability and viability depended on the accuracy of the financial model. Tevel, Katz, and Brock (2015) examined predictive models of nonprofit financial vulnerability and concluded that Tuckman and Chang's model provided an accurate prediction of nonprofit financial viability compared with the Ohlson's, Altman's, and the practitioner's model. Tuckman and Chang's model focused on four empirically tested accounting ratios: insufficient net assets, few revenue resources, low administrative cost, and low income from operating margins (Tevel et al., 2015).

The assumption was nonprofit leaders were challenged by donors to manage their financial ratios and report competitive efficiency ratios. Parsons, Pryor, and Roberts (2017) surveyed nonprofit leaders to determine the extent of donor pressure in the

management of financial ratios. The authors concluded that in nonprofit organizations with heavy reliance on specific donorship such as contributions, government grants, restricted gifts, and gift oversight management, managers did not feel pressured to manage their financial ratios.

Use of performance measurement tools such as the Balanced Scorecard and other performance models should align with organizational goals and the assessment within the context of organizational mission achievement. Mitchell (2015) studied the usefulness of fiscal leanness in nonprofit organizations from financial documents submitted to the Internal Revenue Services between 2004 through 2011. The author concluded that normative nonprofit fiscal practices had a negative effect on fiscal responsiveness. Nonprofit leaders who pursued normative nonprofit fiscal practices such as reduced administrative overhead have reduced responsiveness to external environmental changes (Mitchell, 2015).

Customer Perspectives

Creating value for customers was an important strategy for for-profit and nonprofit organizations. Organization leaders can use customer satisfaction indicators to predict future organizational growth and sustainability (Gawankar et al., 2015; Keränen & Jalkala, 2014). In addition, measurement of performance in customer satisfaction and value creation provided useful information to organization leaders in strategy development and execution (Gawankar et al., 2015; Keränen & Jalkala, 2014). However, measurement of customer value assessment remained a challenge for leaders because the measurements used usually focused on physical products (Keränen & Jalkala, 2014).

Additionally, measurements provided static focus instead of continuous focus, and leaders lacked understanding of customers' perceptions of longevity in the use of organization goods and services (Keränen & Jalkala, 2014).

The strategy map provided solutions to the above challenges in measurement of customer value creation as a visual checklist of the relationship between strategic objectives (Kaplan & Norton, 2004). Leaders used the strategy map to identify attributes of organization goods and services, focus on continuous assessment of customer relationships, and align the creation of customer value with organization strategies (Kaplan & Norton, 2004; Braun, Latham, & Porschitz, 2016; Cheng & Humphreys, 2016). The strategy map included all four perspectives of the Balanced Scorecard: financial, customer, internal, and learning and growth with linkages between each perspective to demonstrate the relational effect each perspective has on each other (Figure 1).

In the customer perspective, leaders' identified attributes of products and services that created value for customers including price, quality, availability, selection, and functionality (Kaplan & Norton, 2004). Attributes combined with long-term customer retention processes of relationship building and product or process branding to increase customer loyalty and retention. The customer management process generated from internal organizational processes and focused on customer selection, acquisition, retention, and growth (Kaplan & Norton, 2004). Leaders identified customers, communicated products and services to customers, and maintained customer satisfaction via responsiveness leading to customer retention and growth (Kaplan & Norton, 2004).

Understanding the relationship of value creation from customers' perspectives and organization point of view defined value creation (Landroquez, Castro, & Cepeda-Carrión, 2013).

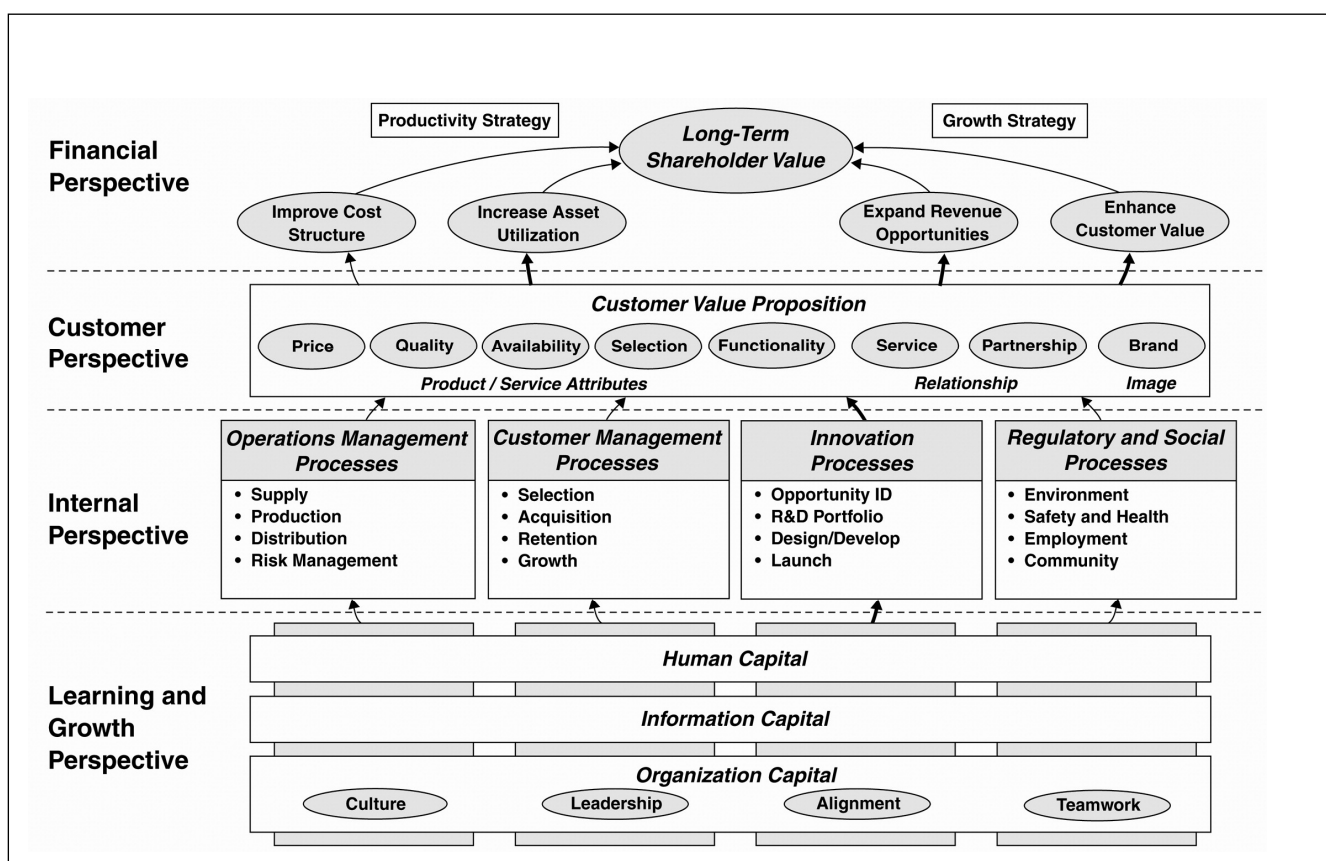


Figure 1. The strategy map showing connections among the four perspectives of the balanced scorecard. Reprinted from the strategy map by Kaplan, R. S., and Norton, D. P. (2004). *The Strategy Map: Guide to aligning intangible assets. Strategy & Leadership*, 32, 3-20. doi:10.1108/10878570410699825.

Customer value creation in nonprofit organizations also involved alignment of customers' values and organization objectives. Customer value goes beyond the one-dimensional view of attaining customers or customers' use of organizational products and services. Zhang, Guo, Hu, and Liu (2017) described customer value co-creation as a fluid process involving the organization and its customers as equal contributors based on interactions and dialogue between both entities. The authors noted that customer

engagement, which involved conscious participation positively affected customer value creation (Zhang et al., 2017). Bellostas, López-Arceiz, and Mateos (2016) noted that nonprofit organizations with organizational strategies heavily focused on the creation of social value realized economic value, however, economic and social value were not combined because of competing goals. Grandy and Levit (2015) studied value co-creation with stakeholders who used services for their intrinsic value. The authors found value cocreation affected organizational performance measures in financial and non-financial indicators tied to organizational mission. This supported the Balanced Scorecard measurement of both tangible and intangible assets in the assessment of organizational performance (Kaplan & Norton, 2004).

Chidley and Pritchard (2014) examined successful strategies organization leaders used to improve customer experiences. The authors identified organizational workforce as a key driver in the value-enhancing relationship with customers. Shifting organizational focus from process improvement to workforce improvement was beneficial to customer satisfaction. Gawankar et al. (2015) supported this conceptual explanation of the Balanced Scorecard methodology. The authors identified performance drivers for each perspective of the balanced scorecard and described their interaction with each other. Improved customer service related to outcomes from learning and growth, and internal processes perspectives, led to favorable financial outcomes (Gawankar et al., 2015). The Balanced Scorecard represented a framework for leaders to view strategic measures as an interrelated extension of the four perspectives, financial, customer, learning and growth, and internal processes (Asgari, Haeri, & Jafari, 2017).

Internal Processes

Organizational sustainability and industry competition highlighted the need for operational improvement processes in nonprofit organizations (Haddad, Ayala, Maldonado, Forcellini, & Lezana, 2016). Nonprofit organizations do not compete in the traditional sense of market competition. However, their viability depended on funding and any condition that adversely affected funding such as market volatility would result in increased competition for donors among other nonprofit organizations (Robineau, Ohana, & Swaton, 2015). To ensure the viability of operations, some nonprofit leaders adapted market-like internal processes and organizational structures (Maier, Meyer, & Steinbereithner, 2016). These processes focused on the efficiency of operations and value creation within and outside of the organization.

Other nonprofit organizations have entered into alliances or partnerships with for-profit organizations to improve corporate social responsibility and customer loyalty with mixed results (Irmak, Sen, & Bhattacharya, 2015; Rim, Yang, & Lee, 2016). The need for specialized operational strategies was beneficial for organizational viability. Ogliastri, Jäger, and Prado (2016) studied the structure and strategies of high performing nonprofits and identified four models or types. The first model was descriptive of charismatic leadership, single product or service, and organizational strategy focused on the achievement of the organization's mission primarily through fundraising activities (Ogliastri et al., 2016).

Expansion of products and services and multiple areas of operations described the second model. In this model, strategy execution involved the use of specialized and

professional workforce in the achievement of organizational goals and objectives. The third model extended the second model and involved a vertical alignment of all products and services and a decentralized structure. In the fourth model, leaders adopted a diversified strategy with multiple product and services (Ogliastri et al., 2016). There was a strong focus on brand identification with multiple specialized units operating under the leadership of a centralized body.

Organizational internal processes were operational activities that improved customer value creation, affected organizational performance, and aligned mission and objectives (Martello, Watson, & Fischer, 2016; Perkins, Grey, & Remmers, 2014). Measurement and adjustment of these internal processes were the focus of process improvement measurements and strategies. Perkins et al. (2014) noted that the measurement of internal processes connected to activities that employees and leaders can change. Molina, Florencio, González, J.M., and González, J.L. (2016) studied the implementation of the Balanced Scorecard in the internal job environment. The authors concluded that implementation of the Balanced Scorecard resulted in improvement in employee commitment, job satisfaction, job dedication, and overall organization climate. Willems, Boenigk, and Jegers (2014) explored challenges in measuring performance in nonprofit organizations. The authors highlighted the complexities involved in the choice of performance measurements in nonprofit organizations and proposed several trade-offs, unidimensional versus multidimensional measurement, formative versus reflective measurements, distinct versus overlapping measurements, and additive versus multiplicative measurements. In the internal business perspective of the Balanced

Scorecard, Kaplan and Norton proposed nonprofit leaders focus on measurements that affected business practices (Perkins et al., 2014).

Value creation is a measure of organizational performance from workforce behaviors and engagement. Newton and Mazur (2016) studied employee and organization value congruence in nonprofit organizations. The author concluded that employees' attitudes towards their job were highly influenced by congruence between their personal values matched to organization values. Helmig et al. (2015) studied whether unique nonprofit values were sources of competitive advantage. Upon conclusion of the study, the evidence presented did not support the assumption of nonprofit advantage in value prioritization and implementation. However, recognizing and understanding complexities of nonprofit management and adapting internal processes accordingly can lead to operational success. Bucher, Jäger, and Cardoza (2016) studied a Costa Rican nonprofit firm that successfully fulfilled organization mission through organization funding structure, mission, and market- focus change. Study results provided information useful to other nonprofit leaders who were pursuing change strategies.

Learning and Growth

Organizational learning and development are necessary components in the evolution and sustainability of the organization. Organization learning and growth were the fourth perspective in the Balanced Scorecard classification of key organizational functions. Martello et al. (2016) described this perspective as the foundation for organizational strategy because the assessment of the skills and competencies of the

organization's workforce allow leaders to determine outcome performance in achieving organizational objectives. In the learning and growth perspective, organizational leaders should develop strategies that fostered the development of a motivated workforce ready to achieve organizational goals (Rae, Sands, & Gadenne, 2015). This aligned with the internal process of the Balanced Scorecard where the value creation processes supported the motivated workforce and increased opportunities for innovation and organizational performance (Rae et al., 2015).

Organizational growth and development described actions by leadership to adjust current models to address organizational shortcomings resulting in organizational change (Bartunek & Woodman, 2015). Cummings and Cummings, (2014) defined organizational development as a social process involving managers, employees, consultants, and experts applying knowledge and practices to improve organization function and performance. Rocha et al. (2015) analyzed the relationship between knowledge management processes and change in nonprofit organizations. The authors identified connections between internal and external influences on organizational knowledge and change. Internal influences included knowledge processes and external influences included external consultants, organizational learning, culture, training, professionalism, and information sharing.

Organizational change resulted from learning and development. The concept of organizational change is complex and can involve different definitions of change depending on the likelihood of change, triggers of change, and management of change (Suddaby & Foster, 2016). Change can occur inside or outside of the organization.

External changes were the drivers of internal organizational change and involved changes in organizational structure, processes, and leadership (Suddaby & Foster, 2016).

Professionalization is a term used to describe the integration of for-profit strategies, tools, and processes by nonprofit organizations (Dobral & Farkas, 2016). Dobral and Farkas (2016) examined professionalization in the nonprofit sector in Hungary and concluded that organizational development influenced the improvement of professionalization in nonprofit organizations. Organization knowledge and change are not mutually exclusive concepts and involve some level of dependency. Organizational knowledge management is descriptive of organizational acquisition and utilization of resources and processes to create and advance organizational knowledge (Salama, 2017). Leaders used the concept of organizational change to identify organizational direction and create strategies to facilitate the change (Hornstein, 2015). Change and learning were continuous and necessary for organizational growth and sustainability (Graetz & Smith, 2010).

Inherent in organization performance were the skills and competence of the workforce as an outcome of organizational learning and knowledge flow. Molodchik and Jardon (2015) studied the effect of organizational culture and transformational leadership on organizational learning. They concluded that organizational culture and transformational leaders have positive effects on learning in organizations. The role of change agents was equally important in the knowledge management and organizational change. Petrou, Demerouti, and Schaufeli (2016) studied the influenced of effective change communication on employees' reactions to organizational change. The authors concluded that effective communication could result in employees proactively seeking

job resources, challenges, and finding ways to reduce job demands as a coping mechanism for organizational change.

Creating a favorable job environment has implications on organizational growth and development. Calderón Molina, Palacios Florencio, Hurtad González, and Galán Gonzalez (2016) explored effects of implementing the Balanced Scorecard and the job environment. The authors concluded that the Balanced Scorecard had positive effects on employee job commitment, job satisfaction, and job dedication. In addition, use of the balanced scorecard to influence variables associated with employee behaviors and motivation has implications in workforce management (Calderón Molina et al., 2016).

Organization Culture and Knowledge Management

Organization culture is a key driver of learning and flow of knowledge in organizations. Saifi (2014) examined the impact of organizational culture on knowledge management and organizational performance. The author categorized organizational culture into three related levels, artifacts or formal structures, beliefs and values, and perceptions. Organizational culture influenced knowledge creation, sharing, and applications and led to organizational performance (Saifi, 2014). Pinho, Rodrigues, and Dibb (2014) explored the relationships among organizational culture, market orientation, organizational commitment, and performance in nonprofit organizations. The authors found for profits and nonprofits organizational culture affected organizational performance. Salama (2017) explored the relationship between organization capabilities and performance. The author concluded knowledge management capability influenced organizational learning. Because internal processes determine strategy execution and

affect workforce skills and intellect, organization leaders might achieve desired workforce outcomes by promoting an organizational culture that supported organizational learning and growth (Salama, 2017). Qiu, Wang, and Nian (2014) studied the impact of organizational gaps during new product development. The authors further stated that organizational knowledge gaps occurred when organizational resources do not meet or align with organizational activities such as the development of a new product. Additionally, they identified the relationship of organizational structures as an approach to the management of organizational knowledge gaps.

Advantages and Limitations of Using the Balanced Scorecard

Popularity and adoption of the Balanced Scorecard were multifactorial. Madsen and Slåtten, (2015) explained the popularity of adoption and implementation of the balanced scorecard with the interrelated fashion and virus perspectives of management. The authors focused on concepts of diffusion and institutionalization within and outside of the organization to explain the spread of managerial processes. In the fashion perspective, organizational diffusion of the ideas occurred at the macro-level or outside of the organization whereas the virus perspectives provided an explanation for the spread of ideas within the organization at the micro-level (Madsen & Slåtten, 2015). Institutionalization at the micro-level did not occur without diffusion of the managerial idea from the macro level (Madsen & Slåtten, 2015).

Advantages of using the Balanced Scorecard. The spread and popularity of the Balanced Scorecard related to ease of application across industries (Elbanna, & Kamel, 2015; Shukri & Ramli, 2015; and Kádárová, Durkáčová, & Kalafusová, 2014). Martello

et al. (2016) studied the use of the Balanced Scorecard in a rehabilitation center. The authors stated that employees gained a better understanding of strategic planning and linkages between different center activities. Punniyamoorthy and Murali (2008) examined the use of the Balanced Scorecard in the information technology industry and concluded that use of the Balanced Scorecard identified and explained changes in the perspectives of the scorecard. Organization leaders have a tool that provided ongoing feedback on organizational components and the alignment of strategic vision with each component. Hu, Leopold-Wildburger, and Strohhecker (2017) noted that use of the Balanced Scorecard facilitated strategy implementation. Hu et al. (2017) studied the use of the strategy implementation processes as an execution of a closed-loop control task and found that use of the Balanced Scorecard provided precision and supportive information useful to the completion of tasks. This supported Hansen and Schaltegger (2016) concept of the Balanced Scorecard as a tool that managers may find useful in their evaluation of individual employee motivational performances and compensational initiatives. Jardali, Abdallah, and Barbar (2015) provided additional support for use of the Balanced Scorecard in measuring employee intentions using the theory of planned behavior and technology acceptance model.

Ozmantar and Gedikoglu (2016) studied the use of the balanced scorecard in an educational institution. The authors concluded that use of the balanced scorecard was beneficial to educational institutions lacking appropriate performance measurement competencies. Ozmantar and Gedikoglu (2016) identified 12 contingent principles necessary for successful implementation of the Balanced Scorecard. The 12 principles

were willingness and openness to change; managerial support; flexible management structure; appropriate team members; training of staff; availability of strategic planning; distinctive balanced scorecard dimensions; specific, measurable, achievable, result-focused, time-specific (SMART) goals; balance in leading and lagging indicators; development of individual scorecard; open communication; and structured report format. These principles were valuable considerations and key foundation components for organization leaders in the implementation of the Balanced Scorecard.

Limitations of using the Balanced Scorecard. The uniqueness of nonprofit organizations compared to for-profit organizations necessitated the use of appropriate performance measurement tools. Kong (2010) explored the use of the Balanced Scorecard as a performance measurement tool in the assessment of nonprofit performance and the concept of intellectual capital in the assessment of intellectual resources. Intellectual capital assessed the intellectual resources in for-profit organizations and focused on human capital, structural capital, and relational capital (Kong, 2010). Unlike the balanced scorecard that incorporated both tangible and intangible perspectives of the organization, the concept of intellectual capital was rooted in the maximization of intangible capabilities of the organization to achieve future growth objectives (Kong, 2010).

Awadallah and Allam (2015) identified several limitations of the Balanced Scorecard in concept and practice. Conceptual limitations included an unclear definition of organization performance, exclusion of key stakeholders from objectives, and missing key success factors (Awadallah & Allam, 2015). In practice, the authors identified

limitations in focus of company resources, and a rigid view of the flow of information in the organization from the top down. Nielsen, Lund, and Thomsen (2017) questioned the application of the Balanced Scorecard in comparison to current managerial measurements of value creation. The authors noted that the Balanced Scorecard represented outdated performance measurement practices based on industrial-era-styled value creation practices (Nielsen et al., 2017). In this view, the authors assessed the Balanced Scorecard as a static framework and stated that managers were unable to make adjustment based organizational relevance. However, Perkins et al. (2014) generational classification of the Balanced Scorecard highlighted the evolution of the framework with information useful to managers depending on the version implemented. Antonsen (2014) examined the use of the Balanced Scorecard and its influence on individual, interactive reflective learning, and the commitment of line managers and employees. The author grouped organizational learning into two categories, adaptive learning or knowledge necessary to perform tasks, and developmental learning or self-directed learning. Organizational learning focused on short-term efficiencies, performance management, and adaptive learning may lead to diminished organizational responsiveness and adaptability (Antonsen, 2014). The author further concluded that the Balanced Scorecard was a one-directional mechanism and did not allow employees to utilize developmental learning skills because directives originated from the top-down and are efficiency-driven (Antonsen, 2014).

Alternatives to using the Balanced Scorecard. Two alternative performance measurements to the Balanced Scorecard are the Baldrige Framework and the European Foundation for Quality Management Excellence (EFQM) model. The Baldrige

framework is a managerial tool to improve quality performance for American companies who compete in the international arena (Bandyopadhyay & Leonard, 2016). There are seven distinct criteria in the framework to guide leaders in their assessment and implementation organizational change. Criteria are leadership, strategy, customers, measurement, analysis, and knowledge management, workforce, operations, and results. Evidenced-based success was a key advantage of the Baldrige framework along with the alignment of organizational strategies and goals (Schulinkamp & Latham, 2015; Lawrence & Hammoud, 2017). Time and cost of application for Baldrige award, generic criteria, and insufficient transparencies were some drawbacks cited by Brandyopadhyay and Leonard (2016) in the implementation of the Baldrige framework.

The European Foundation for Quality Management (EFQM) was established in 1991 as a scoring model for business excellence and organizational improvement (Escrig & de Menezes, 2016; van Schoten, de Blok, Spreeuwenberg, Groenewegen, & Wagner, 2016). The model consisted of nine criteria separated into groups called enablers and results. Enablers represented actions in the organization and the results category described outcomes or accomplishments (Escrig & de Menezes, 2016; Martínez-Moreno & Suárez, 2016). Measurement for organizational excellence had two main scoring categories. Wongrassamee, Simmons, and Gardiner (2003) described the model as an organizational self-assessment tool that leaders can use to understand the organizational position and the need for continuous process improvements.

A similarity existed between the EFQM model and the Balanced Scorecard in terms of objectives. In the EFQM model, there were nine objectives while the Balanced

Scorecard had four areas of focus. Wongrassamee et al. (2003) identified three key differences between the EFQM model and the Balanced Scorecard. The EFQM did not identify organizational strategies, targets, or direct feedback information. van Schoten, de Blok, Spreeuwenberg, Groenewegen, and Wagner (2016) described the EFQM model as a general guide that organization leaders can use to compare organizational quality and identify organizational strengths and weaknesses. Wongrassamee et al. (2003) noted that the Balanced Scorecard had four specific objectives with assigned strategy measures. The researchers explained the relationship between individual compensation and organizational strategy and advised feedback mechanism to capture organizational learning (Wongrassamee et al., 2003).

Transition

A review of scholarly literature provided insights on the use of performance measurements in nonprofit organizations as a strategy to attract and retain donors. Market changes, economic volatility, and, competition among nonprofit organizations have shifted donor focus to nonprofit performance and efficiencies. Nonprofit leaders need to demonstrate a holistic performance management strategy that incorporated innovation, learning and development, customer satisfaction, and financial responsibility. The Balanced Scorecard is a performance measurement tool which nonprofit leaders can use to demonstrate acumen in areas of leadership and governance. The scorecard approach consisted of four distinct perspectives that nonprofit leaders should focus on to meet missions and objectives.

Section 2 of the research has an indepth documentation of the research process

including research design, organization, collection instruments, techniques, data analysis, population sampling, participants, ethical practices, reliability, and validity. Section 3 has a detailed assessment and analysis of the case study of the client organization. The performance framework used in the case study was the 2015-2016 Baldrige Excellence Framework to help ensure a holistic, systems-based evaluation of organizational performance and assist the leader of the client organization in implementing sustainable improvement strategies to meet organizational goals and mission.

Section 2: The Project

Section 2 contains the purpose of the study and explanation of the research process, including information on the role of the researcher, participants, research methods, research design, population and sampling, ethical practices, data collection, data analysis, reliability, validity, credibility, transferability, confirmability, and data saturation.

Purpose Statement

The purpose of this qualitative, single case study was to explore strategies successful leaders of nonprofit organizations use to generate and maintain funding from individual donors. Three nonprofit business leaders from Northeast United States who used successful strategies to generate and maintain individual donor funding represented the target population in this study. Key implications for positive social change included the potential alignment of organizational goals, the creation of value for donors, and leaders' enhanced ability to maintain and improve services that benefit the community.

Role of the Researcher

The role of the researcher is to obtain and analyze data; present findings according to ethical research criteria; and protect the privacy of participants, colleagues, and others involved in the research. I was the sole researcher in this study. I had no previous personal or professional relationships with study participants. During data collection, I used the reflectivity process to guide and reflect on my actions in the collection and analysis of data to identify and address challenges and opportunities (see Postholm & Skrøvset, 2013). The reflectivity process involves the analysis of analytical

processes used to obtain, analyze, and interpret research data and generate knowledge (Enosh, 2010). By using the reflexivity process to reflect on experiences and influences in the research process, the researcher can improve relationships with participants (Råheim et al., 2016).

I followed ethical and moral procedures in the research process for this study. Ethics in research involves the use of informed consent, avoidance of harm and deception, and protection of participants' privacy (Jeanes, 2016; Sanjari, Bahramnezhad, Fomani, Shoghi, & Cheraghi, 2014). Ethical principles guide the conduct of the researcher and ensure that the researcher adheres to moral values (Vogt, Gardner, & Haefele, 2012). Throughout the research process, I followed the institutional review board's (IRB) ethical and moral standards applicable to the use of human participants in research. I also followed the Belmont Report's three ethical principles for the protection of human subjects by ensuring respect for persons, beneficence or well-being of participants, and fair and equitable terms of participation in the study (National Institute of Health Office of Extramural Research, 1974) via informed consent and appropriate risk analysis.

Bias in research can occur at any point in the research process. Bias in qualitative research threatens the validity of the findings (Roulston & Shelton, 2015). I mitigated bias through the formulation and use of a reflexivity process and adherence to research protocol. Strategies relating to the examination of researcher subjectivity and reflexivity help to mitigate biases (Roulston & Shelton, 2015). The researcher can mitigate bias through member checking and careful examination of study design, collected data,

experiences and feelings with study participants, and interpretation of data (Roulston & Shelton, 2015; Thomas, 2017). My strategies for mitigating bias included examination of my relationship with the participants, continuous review of personal influences throughout the research process, and having participants review the accuracy of collected data.

Participants

Participant selection and recruitment are key components in the research process. The eligibility criteria for study participants included nonprofit leaders with experience in donor funding. I selected participants for this single case study using homogeneous purposive sampling. Researchers use purposeful sampling to identify cases that will yield rich and relevant data (Palinkas et al., 2015; Reybold, Lammert, & Stribling, 2012). I selected participants from the firm's leadership board by recruiting those who specialized in executive and community leadership. Study participants were limited to nonprofit leaders who implemented strategies to increase individual donor funding.

Access to study participants is important to data collection and study completion (Pettica-Harris, deGamma, & Elias, 2016). Establishing contact with and gaining access to study participants in qualitative research can be stressful and time-consuming (Monahan & Fisher, 2014). My strategy for gaining access to study participants included use of a facilitator/gatekeeper and completion of a service agreement with specified timelines for deliverables. Gatekeepers play a vital role in gaining access to participants because they have information regarding access to participants and can help the researcher determine the best fit for the study (Given, 2008). The executive director of

my client organization served as both facilitator and gatekeeper of the research site and coordinated access to study participants (see Hoyland, Hollund, & Olsen, 2015). My strategy for establishing a working relationship with my client leader included participating in regularly scheduled conversations and providing evidence-based observations and recommendations to ensure my client leader's ability to meet and exceed the performance goals of the organization.

Research Method and Design

Research Method

I used the qualitative method for this study. Qualitative researchers seek to determine the validity of theories to support the study phenomenon (Lloyd-Jones, 2003). In qualitative research, researchers focus on the observed event in real time with personal contact with participants (Mariampolski, 2001). The aim of researchers in qualitative research is to interpret and explain observations (Emmel, 2013). I sought to explore strategies that leaders of successful nonprofit organizations use to generate and maintain funding from individual donors, so the qualitative method was appropriate for my study.

Researchers use the quantitative method to test hypotheses about relationships or differences among variables (Laher, 2016). The aim of the researcher in quantitative research is to quantify concepts and phenomena (Hanley, Lennie, & West, 2013). I did not test hypotheses to examine the relationships among variables (see Barnham, 2015); therefore, the quantitative method was not appropriate for my study. Mixed-methods researchers combine qualitative and quantitative methods to answer the research questions (Venkatesh et al., 2016). Researchers use the mixed-methods approach to

examine qualitative and quantitative data (Caruth, 2013; Turner, Cardinal, & Burton, 2017). I did not use a mixed-methods approach because there was no quantitative component in this study.

Research Design

The research design was the single case study. In case study research, researchers explore relationships between variables, causal processes, and emergent outcomes, and use a range of techniques to collect and analyze data (6 & Bellamy, 2012). Researchers use a case study design to support theories, generate theories, and collect rich data across complex data sets (6 & Bellamy, 2012). The choice of research design should align with the research question (Purswell & Ray, 2014).

I used the case study design to collect data from multiple sources to enable other researchers to develop conclusions about the external validity of the study. Researchers use the phenomenological design to focus on subjective views of participants (Matua & Van Der Wal, 2015). The ethnographic design involves the study of social phenomena (Brown, 2014). I did not focus on participants' subjective views or the study of social phenomena; therefore, I did not use the phenomenological or ethnographic research designs.

Population and Sampling

The population sample for this single case study consisted of nonprofit leaders who had implemented strategies to attract and retain individual donors. I interviewed three leaders from a small nonprofit organization in the Northeast United States. To ensure alignment of the study population with the research question, I used purposeful

sampling to select the research participants. Researchers use purposeful sampling to ensure that participants provide rich data relevant to the research (Benoot, Hannes, & Bilsen, 2016; Gentles, Charles, Ploeg, & McKibbin, 2015; Palinkas et al., 2015). In qualitative research, sampling can affect the trustworthiness and transparency of collected data and may include information on the definition of sample population, sample size, sample strategy, and sample source (Robinson, 2014). The leaders selected for this case study had experience in the attraction and retention of nonprofit donors and provided data to inform the research.

Researchers use a single case study design to explore and understand a phenomenon of interest (Dasgupta, 2015). Purposeful sampling in case study research involves selecting the case and samples within the case to understand the study phenomenon (Gentles et al., 2015). Participants in this single case study met the criteria of nonprofit leaders who had implemented strategies to attract and retain individual donors. Purposeful sampling enabled me to select participants who could provide detailed information relevant to the research (see Benoot et al., 2016). As a result of purposeful sampling, participants provide rich narratives of lived experiences to strengthen researchers' and participants' engagement (Kallio, 2015). However, variations in the sampling range and inconsistencies in the use of purposeful sampling among qualitative researchers are two major weaknesses of this sampling method (Palinkas et al., 2015).

Appropriate sample size in qualitative research is centered on data saturation (Gentles et al., 2015). The sample size should be appropriate to the research and should provide breadth of information to facilitate data saturation (Guetterman, 2015). Data

saturation in qualitative research refers to the point when no new information is identified (Hennink, Kaiser, Marconi, 2017; Nilson, 2016). The process of data saturation involves collection of varied, quality data to achieve study rigor. To ensure data saturation, I collected data from three different organizational leaders, including the executive director. I also reviewed organizational documents, including grant proposals and financial statements, and reviewed external industry documents from Guidestar.

Guetterman (2015) noted that researchers should have specific sampling strategies and explanations of sample size. Omair (2014) emphasized the importance of sample size estimation prior to the study. All participants selected for this single case study met selection criteria and assigned accordingly. I worked with my assigned client leader to select additional leaders to participate in the study. The client leader received a copy of the research agreement explaining the research and responsibilities of the student researcher. A signed copy of the research agreement between the university and the client leader is included in (Appendix B). Study participants also received an e-mail invitation and explanation of the study. Participants' availability and willingness to share their experiences are important points for consideration in a qualitative study (Palinkas et al., 2015).

In qualitative research, the researcher's aim is to identify data that increases understanding of the phenomenon being studied (Palinkas et al., 2015). To obtain rich data, I examined multiple sources of data, including interview data from organizational leaders who had experience with strategies to facilitate nonprofit donorship, organizational data, and industry data. To ensure rich data from study participants, I had

weekly meetings with my client leader to establish rapport and build trust. Morse (2015) noted that the development of trust with participants would ensure rich data collection. Fritz and Vandermause (2017) noted that the interview process facilitates the collection of important information whereby results may be obtained. I conducted interviews with my client leader based on availability and time constraints. Interview duration varied from 10 to 30 minutes. I used the 2015-2016 Baldrige Excellence Framework (2015) to frame my interview questions in accordance with the research question and the identified areas of opportunity for the client leader.

Ethical Research

Ethical issues can arise throughout the research process, and an important consideration prior to data collection is informed consent (Colnerud, 2013). Prior to engaging my client leader in data collection, I received approval from the Walden University IRB (approval number 09-22-16-0635592). The executive director of the client organization signed the informed consent form to allow participation in the study along with other senior leaders. Participants did not receive any compensation for participation in the study. To ensure protection and confidentiality of study participants, I assigned identifiers (e.g., P1, P2) to participants and used a code to identify the client organization (Company CCN). Study participants were permitted to withdraw from the study at any time without explanation. I stored the collected data in a secure electronic and confidential file on a removable flash drive that will be destroyed after 5 years.

Data Collection Instruments

In qualitative research, the researcher is the primary instrument in the collection

and analysis of data on the researched phenomenon (Fink, 2000). I was the primary data collection instrument in this study. I used the semistructured interviewing technique, which consisted of open-ended questions. I also used an interview protocol to guide the interview process, which consisted of eight open-ended questions relating to strategies nonprofit leaders use to generate and maintain individual donor funding. Interview protocols are useful in building rapport during interviews, and the use of open-ended questions facilitates topic exploration (Vrij, Hope, & Fisher, 2014). Interview questions should be singular and formulated to address interviewees' feelings at the beginning of the interview followed by questions aimed at knowledge and clarification (Brayda & Boyce, 2014). Respondent consent obtained prior to interviews included permission to record sessions. Recording interviews results in longer interview length and yields higher quality data collection (McGonagle, Brown, & Schoeni, 2015).

Data saturation is the point where the researcher has sufficient data to replicate the study and any additional information does not change the outcome (Fusch & Ness, 2015). I interviewed three members of the organization to obtain data for data saturation. Member checking strengthened the reliability and trustworthiness in qualitative research (Birt, Scott, Cavers, Campbell, & Walter, 2016). Member checking allowed respondents to review collected information for accuracy (Morse, 2015). To facilitate member checking, I contacted each respondent and provided a copy of the interview for their review and correction within an agreed timeframe. Additionally, I performed document reviews and analysis of organization performance outcomes to support study validity. The use of multiple data sources increased study validity (Kern, 2016; Jentoft & Olsen,

2017; Turner, Cardinal, & Burton, 2017). A copy of the interview questions and interview protocol listed in Appendix A. Appendices are also listed in the Table of Contents.

Data Collection Technique

I used a qualitative case study to explore strategies nonprofit leaders use to retain and maintain individual donors. Data-collection techniques used were semistructured interviews consisting of open-ended questions via telephone, review of grant documents provided by client participant, review of documents retrieved from the case organization's website, and other publicly accessed sites with information relating the organization. Interview questions listed in Appendix A. Advantages to the use of open-ended questions included respondents were able to build rapport with the researcher (Abell, Locke, Condor, Gibson, & Stevenson, 2006; Rodriguez, Sana, & Sisk, 2014), and provided information specific to the research topic (Slattery et al., 2011).

Arnett (2016) stated that questioning was important in qualitative research to understand the research phenomenon and interviews were some of the most commonly used methods of data collection (Manzano, 2016). The advantages of telephone interviews were successful contact with respondents (Moy and Murphy, 2016). The disadvantage in the use of telephone interview was that the interviewer not able to decipher body language (Brayda & Boyce, 2014). Interviews occurred via telephone as an alternative to face interviews. An additional advantage to telephone interviews was effectiveness in the collecting of rich data during qualitative research (Drabble, Trocki, & Salcedo, 2016).

Hammersley and Trainanou (2014) reflected on the guiding principle of respondents' autonomy in the research study. Use of informed consent protected and informed research participants via disclosure and explanations of the research (Guraya, S. Y., London, & Guraya, S. S., 2014; Nijhawan et al., 2013). The use of member checking increased accuracy in the documentation of participants experiences (Thomas, 2017; Morse, 2015; Koelsch, 2013). I reviewed interview responses with participants using member checking for the accuracy of collected data and made corrections as needed.

Data Organization Techniques

Data organization is important to maintain accuracy and completeness of research data. To organize participants' responses, I used unique codes to identify participants and maintain confidentiality. I used voice recorder and took notes to capture interview responses. The use of an electronic spreadsheet to record data and facilitate coding supported my data collection techniques and template. Researcher reflexivity was necessary to ensure study rigor and trustworthiness (Kelly, 2016). I used a journal to document data collected from interviews along with any thoughts and worldviews. Researchers use reflectivity to disclose personal values and beliefs to prevent influence on data results (Lub, 2015). Reflectivity also enabled the development of researcher experience and knowledge acquisition (Thoresen & Öhlén, 2015). I informed participants of the storage of collected data for 5 years after which time, I will destroy all collected data written and electronic.

Data Analysis

The sequential process for analyzing qualitative data involved the collection of data, organization of data, summarization including the assignment of codes to identify emerging themes, and transformation of data into theory or concepts (MacPhail, Khoza, Abler, & Ranganathan, 2016; Watkins, 2017; St. Pierre, & Jackson, 2014). I interviewed organization leaders, reviewed company documents, industry data, and analyzed organizational outcome data to achieve source triangulation and validity of collected data. Source triangulation is the collection of data from multiple sources and increases the validation of data (Kern, 2016; Papautsky, Crandall, Grome, & Greenber, 2015; Morse, 2015; & Sapsford & Jupp, 2006).

Following data collection, I conducted member checking with participants to ensure accuracy and validity of documents. The Nvivo software was used to identify emerging themes and I manually coded identified themes. I sorted the data into groups using the conceptual map and the Baldrige Excellence Framework to align the identification of key themes. The conceptual map framework for this study was the organization strategy map developed by Kaplan and Norton (2004) and served as the basis for the identification of themes and codes. I analyzed the themes within the conceptual map and research questions framework to explain strategies nonprofit leaders use to retain and maintain individual donors. Researchers used themes to transcribe raw data into a format for analysis and interpretation (Campbell, Quincy, Osserman, & Pedersen, 2013; Constantinou, Georgiou, & Perdikogianni, 2017; Neal, J. W., Neal, Z. P., VanDyke, & Kornbluh, 2014).

Using themes as guide, I was able to analyze organizational processes and results and evaluate outcomes of strategies leaders use to attract and retain donors. I reviewed notes collected during the interview process, and conducted member checking with participants to ensure that analysis and interpretation of the data was accurate and valid. Additionally, I referenced information collected during the interview with organizational documents on key performance outcomes, website information, and industry document to reference data validity and ensure methodological triangulation of data.

Reliability and Validity

Reliability

Trustworthiness of qualitative studies consisted of an evaluation of dependability, credibility, confirmability, and transferability (Morse, 2015). Researchers used reliability in the study to explain dependability of study processes. Researchers can help to ensure dependability by using an audit trail, triangulation, or overlapping methods (Morse, 2015). To increase dependability in the study, I followed an established interview protocol, using a systematic approach in the design and implementation of these steps throughout the research process. I conducted member checking after each interview. Member checking after each interview enabled me to ensure accurate interpretation of collected data (see Kornbluh, 2015). Member checking can also lead to data saturation through the collection of rich information and support study rigor. I used reflectivity to reflect on my personal lens and techniques. Researchers' reflection on personal perspectives and techniques increase the reliability of collected data (Staller, 2015).

Validity

Validity in qualitative research referred to the accuracy of measurable research concepts (Lub, 2015). The researcher used credibility, transferability, and confirmability to establish the validity of study findings. Establishing validity of the research ensured that information used including study design and methodologies were true and the information accurately depicted the phenomena studied (Kihn & Ihantola, 2015; Pandey & Chawla, 2016). Ensuring study validity required the use of multiple perspectives from different sources (Kern, 2015). There were two threats to study validity, internal and external. Internal threats to validity included researcher bias and threats to external validity referred to generalization (Campbell & Stanley, 1963). Researchers also used member checking to ensure truth in the interpretation of data (Morse, 2015). To ensure study validity, I used methodological triangulation to expand on collected sources, perspectives, and accuracy of data. I used a conceptual framework to align study concepts with the research phenomenon and data gathering process to strengthen study validity. I used member checking to ensure the reliability and validity of collected data and information through the process of verification. I reviewed and interpreted interview responses and provided a concise analysis of the data. I provided a printed copy of my analysis to participants for verification and additional information. This process continued until I was unable to collect new data or information from participants.

Credibility

To ensure the credibility of study findings, I performed member checking, review of data, and use methodological triangulation to ensure accuracy in participants'

responses. Member checking allowed for replication of normative patterns of behaviors and increased credibility (Morse, 2015). I provided summaries of collected data to participants for review post interview. Methodological triangulation is the use of multiple data sources to increase the validity of study inferences (Flick, 2016). To achieve credibility in the study, I used semistructured interviews with assigned study participants to obtain information relevant to the research questions. I reviewed internal organization documents and external sources such as GuideStar and used the 2017-2018 Baldrige Framework as a guide to analyze and compare information from each source to increase insights on the study topic. I coded study data and reviewed each source for themes and alignment with research questions. Use of multiple sources of data increased the richness of data quality and supported the validity of the study (Jentoft & Olsen, 2017).

Transferability

Transferability is the assessment by readers of a study and their own interpretation of findings to match similar phenomena (Sarma, 2015). To support the reader in determining transferability of findings, I performed meticulous data collection using the Baldrige Excellence Framework (2017-2018) to frame data collection and analysis, ensure appropriate use of research design, and adhere to interview protocol. Matching research design with the appropriate analysis helped the researcher to align the research problem, research questions, framing ideas, and appropriate methods and designs (Knapp, 2017). Researchers can use this information as a guide to extend future research in the field of nonprofit management and leadership.

Confirmability

Confirmability referred to support of the study. Researchers demonstrated confirmability via member checking, triangulation, and the use of specific interview questions. Participants possess valuable information useful to researchers. Establishing a collaborative relationship and directing the interview was beneficial (Roer-Strier & Sands, 2015). I established rapport with participants and used probing questions to obtain data. I used member checking and methodological triangulation to ensure that I am accurately interpreting participants' responses and reducing study bias. To ensure cooperation with participants, the researcher needed to actively participate in the interview process (Caretta, 2016). The use of triangulation to obtain information from multiple perspectives enhanced study confirmability and validity (Turner, Cardinal, & Burton, 2017).

Data Saturation

Researchers use data saturation to determine appropriate sample size in qualitative research (Hennink, Kaiser, & Marconi, 2016) and the point where additional data collection does not add any new findings or perspective to the study with or without a set number of interviews (Namey, Guest, McKenna, & Chen, 2016). Data amount does not equal the number of participants and depended on the structure of the interview (Morse, 2015). To achieve data saturation, I conducted interviews with members of the client organizations abiding by the terms of the informed consent. I interpreted information received from participants and shared the interpretation with participants for validation. I

continuously reviewed collected data from participants until unable to gather new data or information.

Transition and Summary

Section 2 contained the purpose statement, role of the researcher, participants, research method and design, population sampling, ethical research, data collection instruments, techniques, data analysis, reliability, and validity. The focus of this single case study is to explore strategies nonprofit leaders use to attract and retain individual donors.

I used the 2015-2016 Baldrige Excellence Framework and Criteria to guide the collection and analysis of data for my assigned client's organization (CCN). Section 3 contained the detailed and holistic performance analysis of the case study within several interconnected categories. The case study begins with CCN's organizational profile and the following categories descriptive of organizational processes and performances: leadership, strategy, customers, measurements, analysis, and knowledge management, workforce, operations, and results. The section concludes with the project summary, contributions and recommendations for leaders and future research.

Section 3: Organizational Profile

CCN Organization (pseudonym) is an advocacy organization of parents, educators, and community stakeholders who provide support to families living in the Northeast United States. Organization leaders believe families are necessary for the growth and sustainability of cities. Founded in 2007, CCN leaders continue to lend support to city families by engaging community leaders to provide access to good schools and safe neighborhoods. CCN leaders believe the lack of resources and services are key reasons why families abandon urban living.

Building relationships with community leaders, officials, and parents enables the executive director to implement programs to connect and empower city families. In addition to advocacy programs, the executive director has created programs in which families interact with other families and share resources, stories, concerns, and goals to improve family life and opportunities in the Northeast United States. CCN leaders recognize the loss of families to the suburbs has had a negative effect on social and economic growth in the city. CCN leaders are committed to reversing this trend and attracting more families in the city by providing access to family-centered programs and support services.

Key Factors Worksheet

Organizational Description

CCN is a 501(c)(3) organization located in urban center in the Northeast United States providing support to families living in the city. Organization leaders provide advocacy and program support to families living in this urban environment through the

promotion of access to school, safe streets, and safe neighborhoods.

Organizational environment. Key factors important to organizational operations include product offerings, mission, vision, values, workforce profile, assets, regulatory requirements, organizational structure, customers, stakeholders, suppliers, and partners.

Product offerings. CCN's product offerings include the following: Kids Panel, Family Meet, Fairs, Parents Meet, Town Halls, Discussions, City Information, School Information, School Enrollment Initiatives in several school districts in the southeastern section of the city, Family Assistance, and Advocacy Efforts such as School Budget Campaign, all of interest and value to parents and families.

CCN leaders have tailored program offerings to address the needs and concerns of city families. School Information is a web-based program with information on public, private, and charter schools, and access to the city budget website. Another informational web-based program is City Information in which parents and families can access information on city living, family play areas, kid-friendly restaurants, pediatricians, and breastfeeding information.

Additional supportive services included Kids Panel, which is a forum for parents and kids to hear life experiences from older kids. Family Introduction connects new and expecting parents, Parents Meet connects mothers who may not usually connect, and the Discussion Panel involves open dialogue on challenges of parenting and raising children. Advocacy programs such as Town Halls provide forums in which families voice concerns and address issues with city leaders and school leaders.

CCN leaders are committed to the growth and sustainability of family life in the Northeast United States. CCN leaders use these programs to support the needs of families who choose to live in the city and raise their families. Programs help to fulfill the organization's mission and generate ongoing funding to support these programs. Families and interested stakeholders can access CCN's programs and services via the company website, social media forum on Twitter and Facebook, e-mail, and regular mail.

Mission, vision, and values. CCN's core competencies include advocating on behalf of city families for improved access to good schools and safe neighborhood. These actions relate to the organization's mission (Table 4) of sustaining families and in the Northeast United States. CCN's events enable city families to connect with each other and gain access to services that affect them. In addition, CCN leaders leverage their relationship with community stakeholders, business leaders, and officials to advocate on behalf of city families for access to good schools and safe neighborhoods.

Table 4

CCN Mission, Vision, and Values

Core Competencies
Advocating on behalf of city families for improved access to good schools and safe neighborhoods.
Mission and Vision
CCN Organization is committed to sustaining families and family life in the Northeast United States.
CCN leaders believe that all children and families regardless of race, ethnicity, gender, sexual orientation, socioeconomic background, and circumstances deserve educational, emotional, and community resources to thrive. CCN believes that middle-class families play a vital role in pushing for public resources that provide a stable foundation for families and children from diverse socioeconomic backgrounds.
Values
<p>Actions grounded in research</p> <p>Families catalyze economic stability, job creation, and civic engagement in cities dedicated to building a critical mass of families in the Northeast United States.</p> <p>Recognizing the critical role families play in the economic stability of the city, city families are vital to the growth and development of the Northeast United States.</p> <p>Attraction and retention of families are necessary in urban revitalization.</p>

Workforce profile. CCN's workforce consists of staff members, volunteer members, and one social work intern (Table 5). The workforce consists of members with educational training including a doctorate, master's degree, and bachelor's degree. Workforce members have combined professional experience and skills in advocacy, outreach efforts, school programming, and raising city families.

Table 5

CCN Workforce Profile

Executive director	Chair	Social work intern
Director of community engagement	Vice chair	
Advocacy director	Treasurer	
Office manager	Secretary	
Marketing professional		
Designer		
Chief architect		
Committee members		

Assets. The company provides services to the community out of a rented spaced located in the downtown area.

Regulatory requirements. CCN leaders are licensed to practice in the state of Maryland as a tax-exempt public charity under Internal Revenue Code 501(c)(3). Organization leaders operate under the Internal Revenue Code guidelines for charitable organizations and receive tax-deductible contributions. The organization is required to file annual IRS 990 tax forms and comply with regulations for charitable organizations. Registration as a charitable organization is on file in the office of the Secretary of the State where CCN is located. CCN leaders abide by OSHA guidelines to promote employee and workplace safety.

Organizational relationships. The organizational relationships include internal and external interactions of organization members. Internal interactions focus on organizational structure, and external interactions include customers, external

stakeholders, suppliers, and partners who have an interest in or whose input is necessary for organizational function.

Organizational structure. CCN operates as a charitable organization with a central governance structure. The organization has a board of directors who provide oversight under the guidance of a chair and committee members. CCN's daily operations are governed by the executive director whose responsibilities include board liaison, leadership, and management of organizational functions and operations.

Customers and stakeholders. CCN's key customer groups include parents and families living in the Northeast United States. Key stakeholders are CCN's board of directors, workforce members, educators, community leaders, business leaders, and area grant funders. The benefits for customer groups include the ability to send their children to great schools, live in a safe neighborhood with play areas, have access to public transportation, and have a forum to voice concerns to city leaders. The requirements of key stakeholders are the alignment and implementation of services that enhance the growth, education, and safety of city families in the Northeast United States. Expectations and requirements for organization services are the same across customer and stakeholder groups.

Suppliers and partners. CCN's key suppliers are the Wright Family Foundation, Clayton Baker Trust, Abell Foundation, Lockhart Vaughan Foundation, The Shelter Group, Goldseker, P. Flanigan & Sons, and other area grant funders. Community partners include the city Education Coalition, the Southwest Partnership, the University of Maryland Community Engagement Center, War House, M & T Bank, Allstate

Foundation, Associated Black Charities, Charm City Carousel, Healthy Neighborhoods, Southern Management Group, Work Printing and Graphics, and Merritt Properties.

Suppliers provide the funding to support CCN's programs, and partners work collaboratively with CCN's leaders to provide goods and services to support customer needs such as membership rewards. CCN leaders' mechanisms for communicating with suppliers and partners are the phone, e-mail, website, and social media. Working with partners and suppliers provides CCN's leaders with access to industry innovations and the opportunity to share lessons learned in the delivery of services to customers. Key supply-chain requirements are the delivery of services to meet the needs of families and parents in the Northeast United States.

Organizational Situation

CCN's areas of strategic focus is differentiation of services in the highly competitive arena for nonprofit donor contributions, and the attraction and retention of members through shared community interests and concerns utilizing comparative neighborhood data and surveys. The use of performance measurement tools to assess organizational process and program improvements includes recognized areas of improvement for CCN's leaders.

Competitive environment. Competition with other community service providers in family services is part of CCN's competitive environment. CCN's focus on increasing the number of city families differentiates the organization from other nonprofit organizations in the Northeast United States.

Competitive position. Providing services and support to retain and attract city

families is unique to the CCN organization. There are indirect competitive organizations with overlapping family-oriented services that included the following: (a) The AB (psuedonym), an organization providing support to children and adults with intellectual and developmental disabilities; (b) Catholic Charities providing assistance to families by helping them create safe and sustainable family connections; and (c) the LHI (psuedonym), a youth and family center where families, children, and youths receive counseling to enrich their lives.

Competitiveness changes. CCN's focus on access to good schools and safe neighborhoods differentiates the organization from other charitable organizations in the Northeast United States. School budget cuts and reduced school enrollment have created opportunities for CCN leaders to implement the School Enrollment and PTO Development Implementation program. The development and implementation of this program requires the use of an innovative model to train, develop, and support parent leaders in city schools. Other competitive challenges for CCN are changes in grant funding sources and donor attraction and retention.

Comparative data. Challenges exist in obtaining side-by-side comparative and competitive data with CCN and other charitable organizations because of the organization's unique focus. CCNs leaders obtain generalized industry comparative data from the Maryland Report Card, Baltimore Neighborhood Indicator Alliance, GuideStar, the National Center for Charitable Statistics, the U.S. Department of Education, Giving USA, and the IRS. Comparison data from cities with similar programs include the Philadelphia Education Fund, the Boston Foundation, and A Better Chicago.

Strategic context. CCNs leaders' strategic challenges are related to membership growth, increasing critical mass in the city, state budget cuts, and organizational funding. Funding challenges affect CCN's business operations, program implementations, and workforce. Strategic opportunities include establishing community partnerships to support organizational programs; using innovative strategies to implement community, social, and school-based programs; and increasing commitment from the board, staff, and parent volunteers.

Performance improvement systems. CCN's leaders use comparative data obtained from the Maryland Report Card to assess the effectiveness of their school-based programs in addition to pretested and posttested surveys. CCN's leaders use information from the Baltimore Neighborhood Alliance Indicator to assess the effectiveness of community programs on neighborhood safety.

Leadership Triad: Leadership, Strategy, and Customer

Leadership

The organizational leadership reflects the actions of senior leaders in guiding and sustaining the organization with a focus on strategy and customers. Strategy development and execution indicate how organization leaders plan to move from current organizational state to desired future state. Another important component of organizational success is the focus on customer engagement and the management of customer expectations.

Senior leadership. CCN's senior leaders consist of the executive director and the director of community engagement. These individuals provide the organization with

governance support from the board of directors and follow the guidelines of the organization's mission, vision, and values composed by the organization founder. Senior leaders communicate the organization's vision and values to workforce members and board members through regular meetings. Stakeholders, customers, suppliers, and partners receive communications from senior leaders via the company website, advocacy work, call-to-action initiatives, phone, e-mail, mail, and social media.

Governance and societal responsibilities. CCN's leaders are committed to improving the well-being of families living in the city and practice responsible governance using a traditional governance structure. CCN's senior leaders report to the board who hold them accountable for implementing strategic plans and daily operational leadership (Figure 2). CCN's board members share the responsibility for senior leaders' actions, development of strategic plans, fiscal oversight, development of policies, transparency of operations, selection of board members, protection of stakeholder interests, and succession planning. The treasurer is responsible for fiscal accountability and internal and external company audits. An advisory board provides advice to the governance board and ensures transparency of operations. CCN's governance structure included several committees to help streamline organization activities and increase accountability. Members of the board, senior leaders, committee members, and advisory board members are all responsible for operational transparency. The assessment tool for evaluation of board members performance not provided.

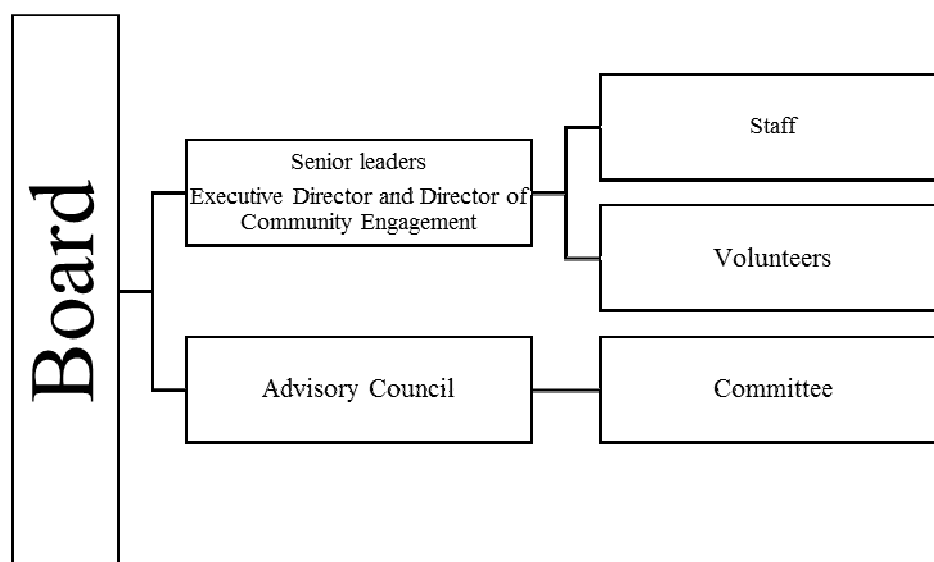


Figure 2. Organizational structure.

CCN leaders consider societal responsibility and the impact of services as part of organization strategic action plan and daily operations. CCN's leaders evaluated issues of concerns to parents and used their core competencies of connecting communities as the basis for organizational programs and advocacy services. CCN's programs support family networks across the city via programs such as Kids Panel and Family Introduction. Stakeholders use CCN's advocacy programs as a platform to give voice to the need for social programs, provide assistance to families, and improve public transportation in city neighborhoods. CCN's leaders recognize the performance gap in public schools and the societal impact of these gaps. They advocate for the integration of schools and communities to improve societal well-being. CCN leaders demonstrate their societal responsibility by partnering with organizations who are committed to financial and social investments in neighborhood revitalization efforts.

Strategy

Strategy development. CCN's leaders identify issues of key concerns to families in the city. They receive information through events, local news, and customers' feedback and comments. Following the identification of key issues, the ED conducts empirical research for data to support the need and potential impact of services. Key participants in the strategic planning process are board members and senior leadership. Short-term planning horizons involved sustainability of current programs such as Kids Panel, Family Introduction, Town Halls, Camp Guides, Fairs, Parents Meet, Bike & Walk to School, and School Social. Longer-term planning goals measured based on the impact of services on community indicators such as those collected and tracked by Baltimore Neighborhood Indicator. CCN's leaders include short- and long-term goals in the planning process with expected outcomes and measures. CCN's leaders evaluate programs, assess continuity of programs, financial impact, and make changes based on organizational capacity, or external changes.

One of CCN's values is actions grounded in research. CCN's leaders use research to support decisions and program implementations. The use of evidenced-based research allowed CCN's leaders to access information on innovative processes and programs. An example is the School Enrollment & PTO Development Initiative. The School Enrollment & PTO Development Initiative is an innovative program that developed PTO leaders to increase school enrollment. School enrollment and increase support of parent leaders were key strategic opportunities. Senior leaders identified strategic opportunities based on alignment with organizational mission, vision, and values.

Data to inform and support strategic planning decisions collected from survey responses, the Baltimore Neighborhood Indicator Alliance, and Maryland Report Card. CCN's leaders analyze data and identify areas of opportunity for program implementation based on the priority of need. Work systems and core competencies aligned with the organization's support of city families and the connection of neighborhoods. Leaders are assigned to specific programs based on expertise in leadership, community outreach, education, and training. The director of community engagement oversees outreach efforts and has proficiency in program and event management. External partners and suppliers align with organizational objectives based on expertise and programmatic fit.

A key strategic objective for CCN is the completion of the School Enrollment and PTO Development initiative by July 2018 (Figure 7.). The most important goal is the procurement of funding to sustain the program. Board members and senior leaders assessed organizational capacity to undertake the initiative, evaluated the needs of current programs, and assigned priorities based on organization mission and goals.

Strategy Implementation

CCN's key short-term and longer-term action plans aligned with organization mission and strategic objectives (Table 6). Oversight of action plan implementation is the responsibility of the CCN's leaders who disseminate the information to the workforce, stakeholders, key suppliers, and partners. The board assessed the current budget and made decisions on the allocation of funds. The ED solicited funding shortfalls and provided supporting documentation for funding requests. To meet the needs of short-term and longer-term strategic objectives of the PTO initiative, parent volunteers, and PTO leaders support the current workforce.

CCN's leaders use information from the Baltimore Neighborhood Indicator Alliance, and Maryland Report Card to make comparisons, identify trends, and use survey results to track the effectiveness of action plans. Performance projections of program effectiveness based on the assessment of historical data and past performances. Whenever circumstances required adjustments or changes in action plans, CCN's leaders and the board would meet and discuss the need. CCN's leaders are responsible for dissemination of information and organizational direction.

Table 6

Strategy Implementation

Inputs what we invest	Outputs		Outcomes			Results
	Activities what we do	Participants whom we reach	Short-term action plan	Medium-term action plan	Long-term action plan	Alignment with objectives
1. Community programs. 2. Partnerships – City education coalition, Southwest partnership, University of Maryland, Community engagement center. 3. Resource development. 4. Education and children programs. 5. Walkability & transit sustainability.	Advocate for parents and children in the Northeast United States focusing on good schools, safe streets, and great neighborhoods. <u>Programs/ initiatives:</u> Community calendar Kids Panels Town halls Discussion panels Camp guide School & children programming fair Family introduction Fundraising event	Families living in the Northeast United States.	Continue to work on the school budget initiative. Provide on-going parental resources Financial funding	Increase school enrollment. Maintained public spaces. Increase in the pedestrian-friendly public spaces. Donor retention. Membership. Financial funding.	Retention of city families. Educational access and opportunities. Sustainable communities. Donor retention. Membership.	Funding. Membership. Critical mass.
			Outcome measures			Outcome results
			Short-term – User feedback and program sustainability. Medium-term – Comparison to baseline data. Long-term – Programs impact on the quality of life index in the Northeast United States.			

Customers

Voice of the customer. CCN's leaders use various listening methods to obtain information from their customers including company sponsored community events, social media forums, social gatherings, seminars, rallies, and partnerships (see Table 7). Leaders obtained information for actionable items on programs effectiveness, areas of concerns, and efficacy of programs through direct communication with customers and stakeholders. Potential customers can access CCN's website, social media forums, or contact the ED and DCE directly regarding actionable items. In keeping with the organization's mission to focus on families, CCN's leaders prioritized actionable items that affect family lives such as access to schools, improving neighborhoods, and safe streets.

Table 7

Customer Listening Methods

Phone	All	D
E-mail	All	D
Mail	All	D
In-person visits	All	D
Social media (Facebook, Twitter, LinkedIn, Pinterest, Google)	All	D
Events		
Kids panel	Parents	Sa
Family introduction	Parents	Q
Bike/walk to school day	Parents	Tbd
fairs	Parents	Sa
School social	Parents	Tbd
Open houses	Parents	Sa
Parents meet	Parents	Tbd
Town halls	All	An
Discussion panels	All	Sa

All – (parents, Partners, Individuals, Donors, Organizations, Members, Non-members). Frequency: D – Daily, Q – Quarterly, An – As needed, Sa- Semi-annually, TBD – To be determined

CCN’s leaders used surveys and feedback from the organization’s website and social media posts to obtain information on customer satisfaction, dissatisfaction, and engagement. In 2017, the organization leaders surveyed members and city residents to obtain information on issues affecting families in the Northeast United States. Survey results revealed that school quality and school community connectedness were top concerns (Table 9). Using feedback from this data collection and analysis, CCN’s leaders captured actionable information to enrich current and future programs and increase

program satisfaction (see Figure 5.).

Customer engagement. CCN’s leaders determine customers, market needs, and organizational services through analysis of empirical research and feedback from customers.

Table 8

Campaigns and Advocacy Events

Put down roots	Advocating green streets	Organization, Baltimore Tree Trust, & P. Flanagan and Sons
PTO networking luncheon	Support school enrollment	Organization
Count me in donorship	Support school funding	Organization
Town halls	Engage city leaders	Organization
Discussion panels	Supporting parents	Organization
School and children programming fairs	Information on schools	Organization
Member appreciation pool party	Supporting members	Organization
Kids panel	Supporting parents	Organization
Family introduction	Supporting parents	Organization
School fair school registration	Supporting parents	Organization
Swag shop	Fundraising and informational	Organization
Merchant partners	Donors/organization support	125+ Partners
Donations	Organization support	Open to all
Volunteer opportunities	Organization support	Open to all
Family assistance	Supporting families	Organization

Organization – Unidentified partners
All – Stakeholders, members, non-members, board, individuals, organizations, parents, partners,

Organizational leaders offer multiple forums (see Table 8) to address concerns of customers and lay the foundation for advocacy efforts, and organizational programs that meet customers’ needs. Kids Panels, Family Introduction, Family Assistance, and Discussion Panels are programs offerings that provided support for city families

experiencing challenges connecting to necessary services and support.

Customer support and communication mechanism are available via direct organizational contact and notifications. The Contact Us section of the organization's website provided multiple methods of contact, phone, e-mail, mail, in-person visits, including phone and e-mail contact with the executive director (Table 7). Members of all customer groups are encouraged to share their ideas and comments to improve services and advocacy efforts. CCN's services and programs focused on parents and families in the city. Customers use CCN's services and programs to access educational opportunities, community services, and cultural services. Customers gain access to vital family services on the organization's website under City Information. City Information allowed linkage to family-friendly information under the headings of City Living Guides. Information on Where to Play, Kid Friendly Dining, Child Care, and other parental services, such as the state Family Network, provided information on childcare, city Breast Feeding resource guides, and pediatricians in the northeast United States. Data regarding customers and market segments obtained from organizational events, the Baltimore Neighborhood Indicators Alliance, and the Maryland Report Card.

CCN's leaders build and manage customer relationship through a shared connectedness with customers. Organization leaders live in the city and raise their families in the city. They are influenced by the same factors and concerns of their customers; access to good schools, safe streets, and sustainable neighborhoods. CCN leaders' partner with key stakeholders to advance their advocacy efforts and demonstrate programs effectiveness. Their successful 2nd annual Fundraising event celebrated the

city's food and culture and brings together donors and interested participants to raise money in support of organizational efforts. CCN's leaders use social media as an advocacy forum, for example, the School Budget Initiative. The School Budget Initiative advocacy campaign is an on-going program to restore public school funding. The program required supporters to sign an online petition in support of the initiative and join an in-person march that took place on March 4, 2017. Supporters can become members of CCN to continue their support of the program through information listed on the organization's website. In June 2017, advocacy efforts resulted in the restoration of \$2.58M in funding to community schools and after-school programs and \$7.58M in funds, majority allocated to the city's public schools for the coming year, 2018 (Figure 6.). Social media played a vital role in getting the information out regarding the School Budget Initiative campaign.

Results Triad: Workforce, Operations

Workforce

Workforce environment. CCN's leaders assess workforce capability and capacity needs based on organizational areas of focus and alignment with staff expertise, skills, and competencies. A key organizational focus for CCN's leaders is the school enrollment initiative. To sustain the rollout, organizational leaders utilized board members and parent volunteers with experiences in schools with high enrollment levels. The director of K-12 Initiatives is a licensed social worker who will lead elementary, middle, and high school programming and has core competencies and skills in community and charter school leadership development. Overall program supervision is

under the leadership of the organization's ED, and outreach efforts and events programming managed by the DCE with assistance from a social work intern.

CCN's leaders aligned workforce members' skills and expertise to the needs of the organization. The workforce included two segments, organizational leaders, and volunteer staff. Organizational needs and continuity of operations are closely monitored by the board and senior leaders to meet organization obligations and commitments. The executive director provided support and assistance to team members and worked collaboratively with community engagement director to minimize change impacts in the organization. For example, before the ED's leave of absence, there were several additions to the current workforce including an advocacy director, marketing professional, office manager, designer, and chief architect to ensure continuity of operations and programs. In the ED's absence, the advocacy director is responsible for day-to-day operations and main contact for CCN.

To organize and manage the workforce to accomplish the organization's work, CCN leaders focused on leadership skills and assign workforce to maximize core competencies. CCN leaders divided operational leadership into subcommittees with emphasis on Community Engagement, Resource Development, Education & Children's Programming, and Walkability & Sustainable Transit, emphasizing alignment with CCN's core mission, vision, and values (see Figure 3.).

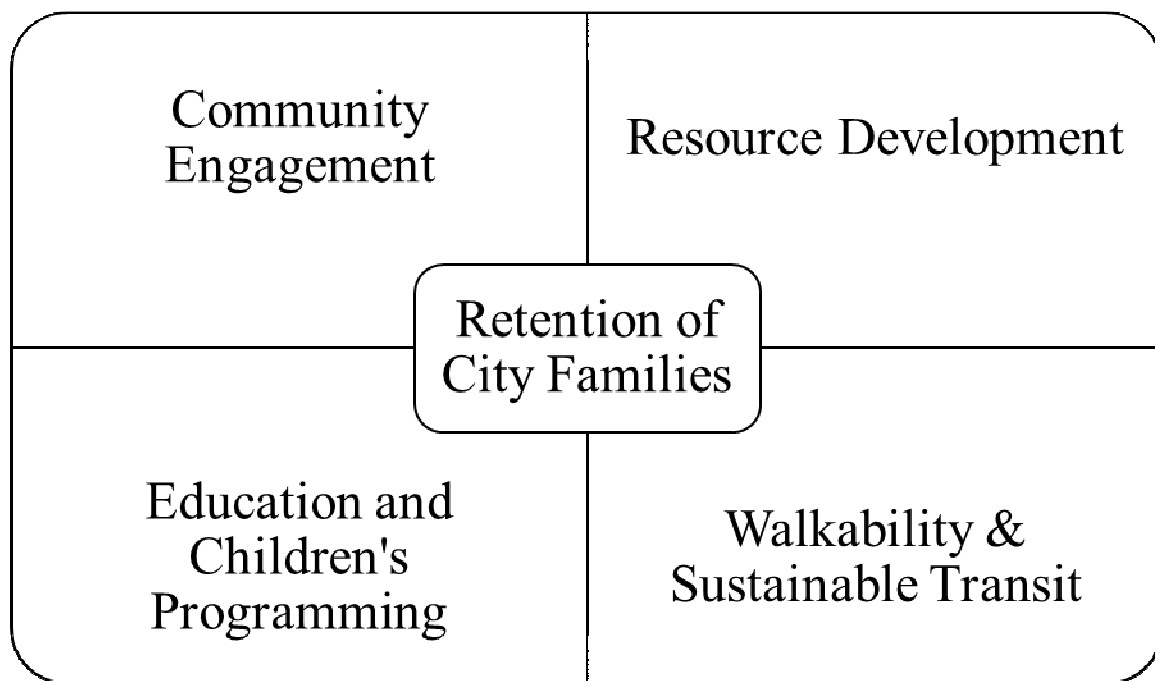


Figure 3. Workforce organization and management.

CCN leaders maintained workforce safety, health, and security by adhering to regulatory agencies guidelines including OSHA guidelines to create a workplace free of potential harms to employees. Information on workforce safety provided to employees during meetings. Organizational documents kept confidential and private. Team members have access to a shared, cloud-based drive that housed pertinent organizational documents called FlipCause. FlipCause is password protected and data encrypted. Performance measures and improvement goals for the workplace environment not provided. CCN leaders provide support to employees with daily operations. For example, the ED allotted specific time to help train and onboard new members. One of the latest addition to CCN workforce was the office manager who credited the ED with mentorship and training. CCN leaders do not provide insurance benefits or formalized training.

Workforce engagement. CCN's organization culture reflected open communication with senior leaders. A key driver of workforce engagement is ownership. Some workforce members struggle with ownership of actions and timely execution of work. CCN leaders have an informal assessment of workforce engagement, execution and timeliness of work. Workforce performance management system was not obtained. There are no systematic workforce or leader development systems. A career progression system was not identified.

Operations

Work processes. The requirements for products and services aligned with CCN's mission to attract and retain city families with a focus on schools, neighborhoods, and transportation. Senior leaders and the board tailored programs and services to meet the needs of city families. Work processes supported the development and implementation of products and services that represent the mission, vision, and values of the organization. Key work processes aligned with identifying a service or program need, gathering empirical data to support the identified need, assessing financial viability associated with the service or program, implementing program or service, obtaining funds to support the program or service, and evaluating and reassessing the continued viability of the program or service offered.

Senior leaders designed programs and services that aligned with the organization's mission, vision, and values. They managed work processes that supported the creation of these programs and services. Organization knowledge, innovation, and customer feedback were all components of programs and services creation. Day-to-day

operations aligned with the key process requirements. Key process requirements of CCN's services were the quality and effectiveness of services and programs produced remained the same across customer and stakeholder groups.

CCN's leaders evaluated and made improvements to their work processes based on feedback received on products and services in addition to information on industry best practices. Supply chain suppliers selected based on similar goals and objectives. CCN's leaders focused on suppliers who with strong interests regarding the needs of children and families. Suppliers' performances based on surveys and feedback from customers. Opportunities for innovation arise from the need to improve the quality of programs and services offered to city families. Senior leaders used research to support programs and services and used innovative methods and models to achieve goals. Senior leaders received feedback on products and services via multiple forums (Table 7), and they used the information to pursue strategic opportunities.

Operational effectiveness. The board of directors and CCN's leaders reviewed organizational effectiveness and efficiencies of company operations. CCN's board of directors and senior leaders balanced cost controls and operational performances with an annual budget that included specific goals and objectives. The treasurer and external account provided additional oversight of operational cost.

Measurement, Analysis, and Knowledge Management

Measurement, analysis, and improvement of organizational performance.

Senior leaders used customer survey data and information from the Baltimore Neighborhood Indicator Alliance, and Maryland Report Card to track information on the

execution of actions plans, and the achievement of strategic objectives. Performance measures to track daily operational performance not obtained. Key organizational performance measures listed in Table 6. Comparative data and information to support evidence-based decision making are available to senior leaders from the Maryland Report Card, the Baltimore Neighborhood Indicator Alliance, U.S. Department of Education, GuideStar, Comparison data or information from cities with educational programs similar to CCN are The Philadelphia Education Fund, The Boston Foundation, and A Better Chicago.

Voice-of-the-customer and market data and information collected from surveys, feedback information obtained from the company website, social media forums, and events. CCN's leaders used the information to performance program and service improvements to meet customers' demands. Formalized organizational performance measurement system not identified. Organizational performance and capabilities assessed based on the effectiveness of programs and services using historical data and comparison data received from surveys, Maryland Report Card, and the Baltimore Neighborhood Indicator Alliance. CCN's leaders and the board uses the data to assess the effectiveness of programs based on goal achievement and customer responses and make changes. Senior leaders and the board review the budget and financial capacity to fund services and programs and make recommendations regarding funding and fundraising amounts to fill shortfall gaps.

Future financial performance is projected using information from past performances and the current needs of existing and new programs. There were no

formalized performance review systems. Information regarding organizational data and information systems not obtained. Organizational knowledge is a shared system with open communication among workforce members. A formalized system of knowledge sharing not obtained. The organization does not have a formalized system for training and on-boarding. Workforce knowledge consists of continuous on the job learning.

Information and knowledge management. CCN's leaders maintained the integrity and safety of their information system via a formalized software management system called FlipCause. FlipCause is a cloud-based system that is password protected with data encryption. Organizational users used a share drive platform to organize and manage fundraising data and information. The integrity of organizational data is important to CCN's leaders. CCN's emergency preparedness plan includes cloud-based storage and physical storage of company documents and appropriate user access.

Collection, Analysis, and Preparation of Results

Product and Process Results

CCN's leaders are committed to the growth and expansion of services and offer free and contributing membership fees to include a diverse financial membership base. Contributing membership fees start at \$25 and include tiered membership levels; Inner Harbor Hero \$50, Charm City Champion \$100, and Star-Spangled Supporter \$250. Contributing members enjoy additional benefits (e.g., Star-Spangled members receive two free tickets to the annual fundraising Stoop Soirée Gala). Membership fees align with organizations providing family services such as the city's Catholic Charities and The AB. Figure 4 shows 2017 membership fee comparisons.

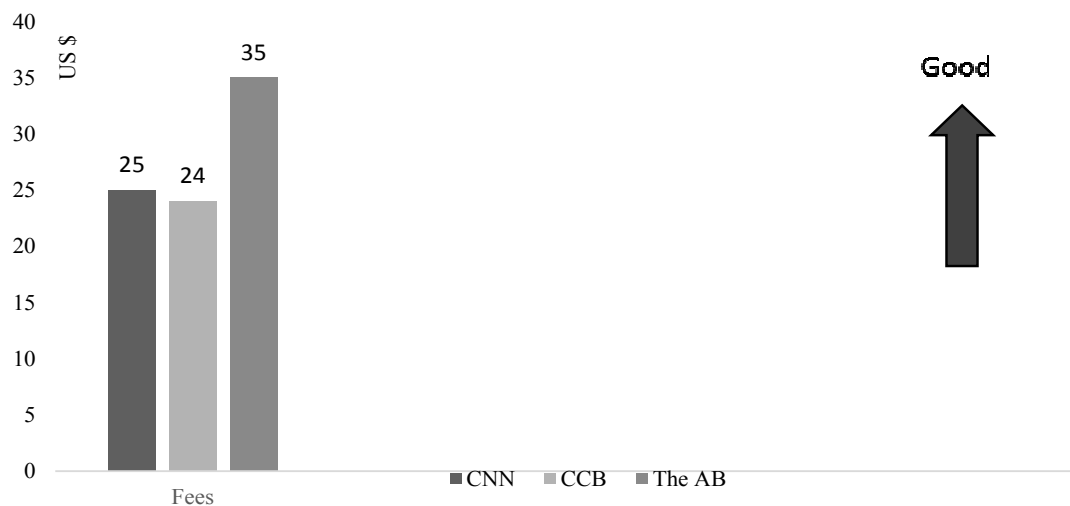


Figure 4. 2017 membership fees.

Customer Results

CCN's customer-focused services are informational, supportive, and advocacy-based. In 2017, the School and Children's Programming Fair held twice a year had over 300 prospective parents in attendance at each event, and 25 parents attended the PTO Lunch discussions. The Kids Panel event had over 50 parents in attendance with similar projected numbers for 2018. 2016 attendance data not obtained, however, projected 2018 program attendance indicates program growth and relevancy of current programs to community need.

CCN's advocacy efforts resulted in \$2.58M funds restored to community schools and afterschool programs in 2017, and \$7.58M funds restored to majority public schools for 2018, totaling \$10.16M for 2017-2018 school year. Advocacy data for 2016 not obtained. However, 2015 advocacy efforts resulted in a commitment from the governor to

provide a \$12.7M supplemental budget for the city’s public schools. Figures 5 and 6 shows breakdowns of CCN’s programmatic activities attendance and advocacy efforts for 2017.

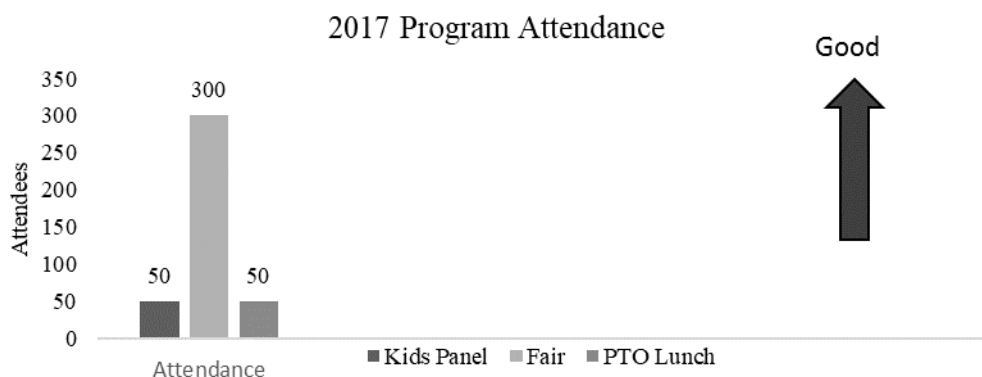


Figure 5. CCN program attendance FY2017.

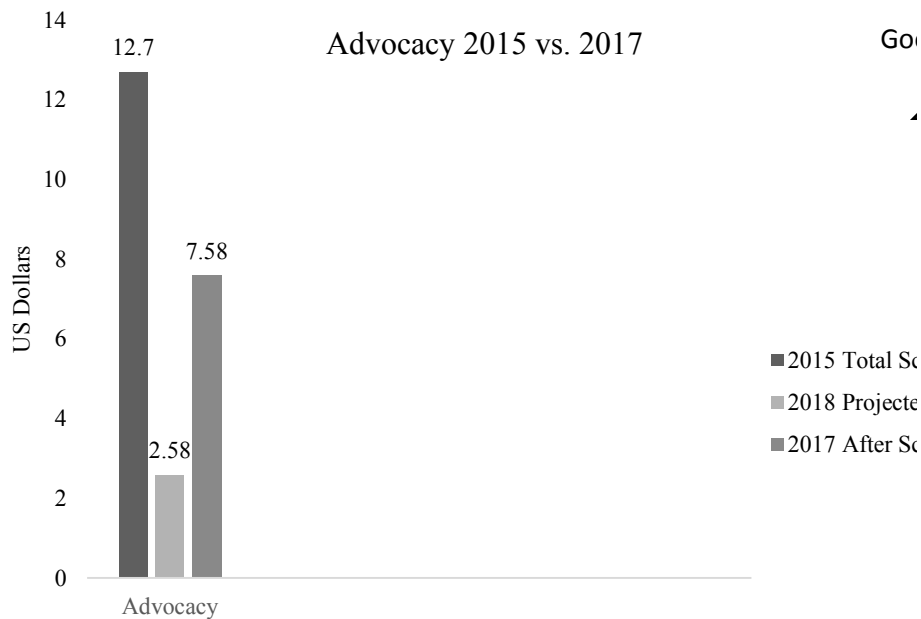


Figure 6. Advocacy 2015 vs. 2017

The school enrollment program is a key initiative for CCN’s leaders with

proposed benefit to over 4,000 students and families in the southeast areas. Schools in which CCN had successful PTO programs represented by school A, school B, and school C. Figure 7 showed enrollment trends from 2014 to 2017, indicating increase from 516 students in 2014 to 553 in 2017 for school A; increase from 464 students in 2014 to 482 in 2017 for school B, and increase from 280 students in 2014 to 353 in 2017 for school C. Comparison data from the 2017 U.S. Census Bureau report revealed that total United States (U.S.) school enrollment from kindergarten through eighth grade did not show a significant increase, rising from 36.1 million in 2006 to 36.6 million 10 years later (U. S. Census Bureau, 2017). In addition, the number of high school enrollment in U.S. schools did not increase significantly between 2011 and 2016 (U. S. Census Bureau, 2017), indicating beneficial impact of CCN's enrollment programs and school enrollment data.

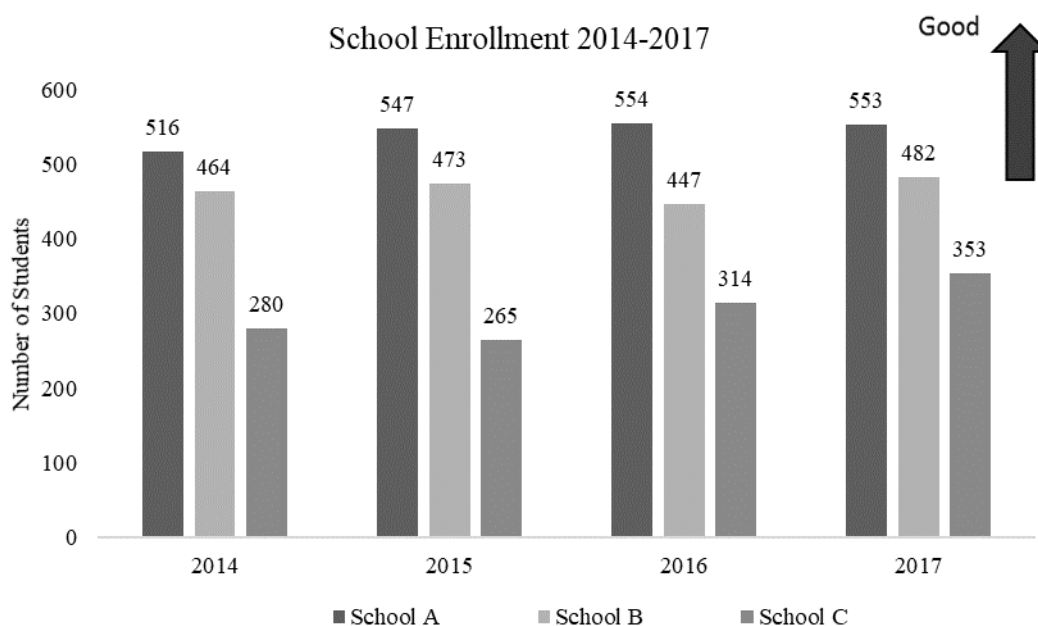


Figure 7. School enrollment 2014-2017.

CCN's leaders ensured alignment of programs and services with the needs of their community. Information received from CCN's 2017 City Survey and the Baltimore Neighborhood Indicators Alliance (BNIA) 2015 report highlighted two common concerns of city families and the necessity of CCN's programs, and services see Table 9.

Table 9

2017 City Survey and 2015 BNIA Survey Questions

Responses (Positive/Negative)	2017 City Survey	2015 Baltimore Neighborhood Alliance Survey
Positive	Concerns about school quality	Concerns about school quality
Positive	Connectedness to school community	Connectedness to school community

Workforce Results

In 2015, CCN's workforce consisted of ED and three part-time workers. To increase efficiency, CCN workforce model includes three full-time staffers an intern (Table 10).

Table 10

CCN 2017 Workforce vs. 2016 Workforce

2017 Workforce	2016 Workforce
ED	ED
Three Full-time staffers	Two Part-time staffers
Volunteers	Volunteers
Intern	

CCN's leaders used a workforce model to align organizational need with staff expertise,

skills, and competencies (Table 11).

Table 11

Workforce Expertise

Workforce Expertise	
Executive Director	-NGO management.
Community Engagement Director	-Program management, event planning, master's degree
Advocacy Director	-Advocacy experience and training
Office Manager	-Experience in office management
Director of School Programming	-School programming and training, public policy advocacy, licensed social worker, master's degree
Intern	-Bachelor's degree and social work field placement

Leadership and Governance Results

CCN's leaders lead the organization via the development of a strategic plan (2015) and evaluated service effectiveness from key indicators reports from the Baltimore Neighborhood Indicator Alliances (Table 12). Performance outcomes within the leadership and governance category not obtained and represented a gap in results for this category.

Table 12

Key Program Indicators

Key Program Indicators	
2017 Maryland Report Card -School Enrollment -Student Demographics	2017 Baltimore Neighborhood Indicator -Education and Youth Indicator School Enrollment and Demographics

Leaders continue to work towards growth and sustainability of organizational programs

through partnerships and alliances with key stakeholders including business, government, and philanthropic leaders. Organization leaders complied with IRS requirements for 501(c)3 organization. Information regarding IRS 990tax filing and financials are available on GuideStar.com. CCN's governance and accountability are the responsibility of the board of directors and senior leaders.

Financial and Market Results

In 2017, CCN's grant awards totaled \$55,000 compared to \$63,000 in 2015, 2016 data not obtained. Board member contributions were \$15,000 in 2015 with projection of \$15,000 for 2016 indicating strong board participation in fundraising activities. In 2017 YTD contributions was \$8,275.00. Donor members contribution was \$1,000 in 2015, expected contribution \$20,000 in 2016, 2017 data not obtained. Using industry data as a benchmark for charitable giving in 2015, individual donations increase 3.8%, grants 6.5%, and corporation 3.9% (Figure 8). In 2016, CCN's leaders expected Fundraising Event contribution of \$45,000. Comparison data for 2017 Fundraising Event results are not yet available.

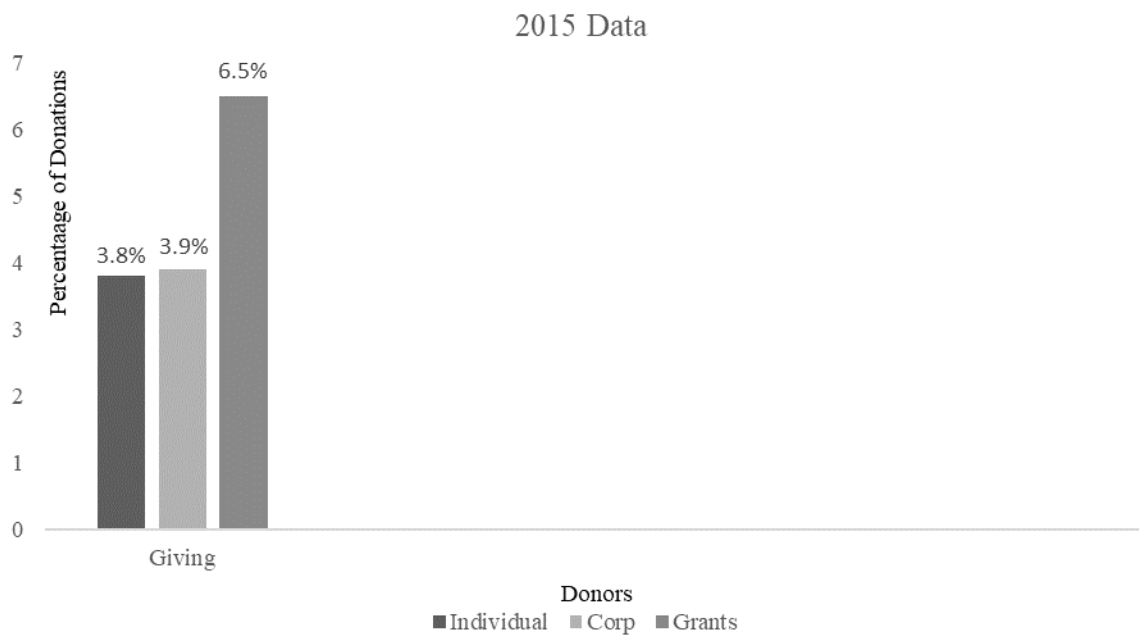


Figure 8. 2015 United States charitable giving.

CCN's contributions received in 2014-2016 obtained from GuideStar.com, Figure 9. In 2014, contributions totaled \$127,546. Contributions decreased in 2015 to \$77,519 and increased to \$78,761 in 2016. The data for 2017 not obtained.

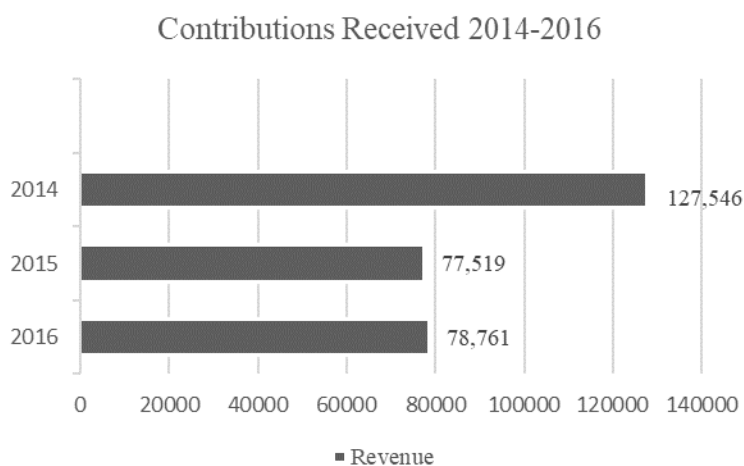


Figure 9. CCN contributions 2014-2016.

Industry data received from the Stanford Survey (Meehan & Jonker, 2017) noted that nonprofit leaders experience challenges with fundraising (FC), have difficulties meeting fundraising goals (GC), inadequate capacities to generate funds from individual donors, and under-utilize board contributions and participation in fundraising activities, which leads to fundraising difficulties (FD). See Figure 10. CCN's fundraising data reflected industry trends in fundraising challenges. However, CCN's board leaders demonstrated active engagement and commitment to meeting fundraising goals and leveraging of board member roles in obtaining and giving funds.

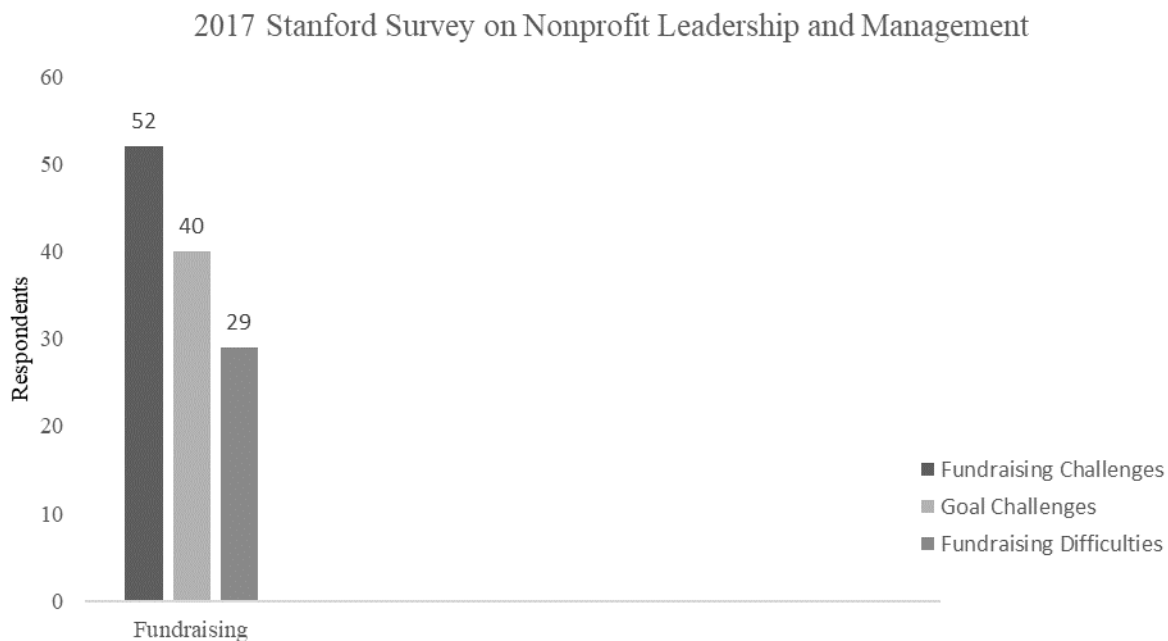


Figure 10. Nonprofit leadership and management,

Key Themes

Process strengths. Organizational processes are sequential or series of related activities necessary for the creation, evaluation, and improvement of the organization's goods and services. Process deployment, method of use, integration, and the continuum for learning are reflected in systematic acts throughout the organization.

Strength in fundraising process was an identified theme for CCN's leaders. CCN's leaders developed their internal process for fundraising using workforce skills and expertise to meet organizational needs (Table 11). The director of school programming and the ED lead grant writing and public policy advocacy actions based on their experiences and past successes in obtaining grants and donor funding. CCN's leaders have a process for obtaining funds that included a defined method involving phone calls,

meetings, and luncheon depending on donor relationship; evaluation of actions based on goals met and unmet; and communication throughout the organization at scheduled planning sessions. Schnackenberg and Tomlinson (2016) stated that organizational transparency consisted of information disclosure, accuracy, and clarity and was the main component of stakeholder trust. CCN's leaders used job competency alignment and effective communication strategies to support organizational process management.

A second identified strength was strategy alignment in the creation of organizational programs. Organizational leaders created programs that satisfy community needs and align with organizational values. Programs are the extension of CCN's commitment to the growth of city families, creation of networks, and community relationship. CCN's leader's used research feedback to determine program importance and direct fundraising efforts to sustain these programs, for example, school PTO programs.

Process opportunities. My review of CCN's processes revealed areas of opportunity in some formalized documentation of processes, systematic evaluation of program effectiveness, and organizational learning. It is my recommendation that CCN's leaders have a formalized documentation of processes including the consistent use of annual report with information on financial data, program attendances, website access, and goals associated with advocacy programs. Another area of opportunity was the use of a quality improvement tool such as the Plan Do Study Act (PDSA) performance evaluation tool to evaluate program effectiveness. The PDSA tool may benefit CCN's leaders because the use of the tool allows users to quickly ascertain the effectiveness of

implemented programs and adjust meet desired outcomes (Reed & Card, 2016). Plan - measurement of program impact, Do - document observations, Study - analyze data, and Act - make changes based on findings. I recommended CCN's leaders use the PDSA quality improvement tool to make changes, measure, and improve community programs and services (Figure 11). CCN's leaders may consider implementing a formalized employee onboarding and learning process. Having a formalized employee training and learning process ensures consistency of practices and allows leaders to implement evidence-based adjustments to improve learning and organizational growth based on organizational learning.

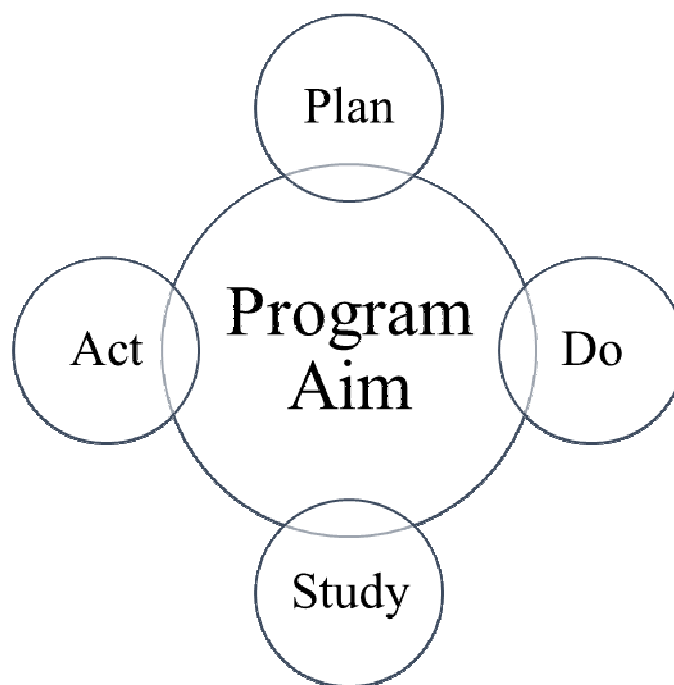


Figure 11. Measurement tool: Plan-Do-Study-Act.

Results strengths. Evaluation of performance results revealed comparable alignment of membership fees within the industry. Alignment with industry fee schedules suggested normalizing competition for services and expansion of funding sources. I

suggested continued evaluation of fee schedule via yearly survey to ensure funding goals continue to align with organizational goals and members' satisfaction. In addition, I recommend organizational leaders continue to focus membership efforts on individual donors. The Stanford survey (2017) reported that individual donors accounted for 71% of total donations in 2015. Having a variety of donors may lead to increase in funding and help organization leaders meet their goals. Attendance at School and Children's Programming fair and PTO luncheons showed consistent attendance and program utilization. The School and Children's Programming fair continued trend of over 300 participants at each event, and the PTO luncheon numbers remained stable with 25 parents in attendance at each event. The trend in program utilization resulted from CCN's leaders data collection organizational survey and the Baltimore Neighborhood Indicator Alliance survey on actions important to families.

Other areas of result strengths were advocacy actions for 2017 showing an upward trend. Specific advocacy goals for 2017-2018 not established; however, CCN's advocacy efforts resulted in the committed restoration of \$10M to school budget to fund necessary community and afterschool programs. The school enrollment program continued to show growth and an upward trend in school enrollment for three consecutive years (2014-2017) in School A, School B, and School C. This related to CCN's strategy implementation and execution of the PTO program. CCN's leaders developed a 12-month enrollment program rollout involving the use of parent leaders to build structures in schools and support parents, students, teachers, and other stakeholders. The PTO program was another alignment of CCN's workforce expertise and training. To execute the

organizational strategy, leaders with expertise in school programming, advocacy efforts, and community relationship building skills drive program implementation and growth.

Results opportunities. Opportunities in performance results existed in the lack of formalized performance measurements of organizational programs and programs impact. I suggested organization leaders evaluate program effectiveness and impact utilizing performance measurement with immediate results (used as baseline data), intermediate and long-term months and year to date results. Information on CCN's program impact obtained from the Baltimore City Quality of Life Index and the use of performance measurement frameworks. The use of performance measurements can provide important information whether strategic actions will lead to the realization of strategic plans.

CCN's program supported and encouraged the growth of city families in Northeastern United States and were unique to the organization. Mirrored competitive data was lacking along with industry data. I recommended CCN's leaders use data from organizations with similar programs that focus on sustaining and supporting families, school enrollment, and neighborhood growth. Leaders can use data from cities such as Boston, Philadelphia, and Chicago with similar programs. Use of competitive data increase program evaluation by providing benchmarking and baseline data.

Project Summary

Nonprofit organizations play a vital role in providing services and programs to sustain and support communities. To remain viable, nonprofit organizations need a sustainable source of funding (Ramanath, 2016). I explored successful strategies nonprofit leaders use to generate and maintain funding from individual donors. Study

participants were nonprofit leaders from a small nonprofit organization located in the northeast United States. Nonprofit leaders can use information from this single case study to improve strategies to sustain and obtain funding from individual donors.

In order for nonprofit leaders to implement successful strategies and organizational change, assessment of organizational performance is necessary. Nonprofit leaders operate in a dynamic environment with limited access to funding resources (Lee & Nowell, 2015). The assessment of organization performance provides leaders with information on the competitive state of the organization and requires the use of performance frameworks specific to nonprofit organizations such as the Baldrige Framework or the Balanced Scorecard. Organizational assessment is complex and relates to all areas of the organization including organizational make-up, leadership, strategies, customers, measurement of organization processes and knowledge, workforce, and operations. Nonprofit leaders can use information from this study to develop a systematic process to assess organizational viability and evaluate if current organizational strategies related to organizational goals and outcomes. Additionally, nonprofit leaders can also use information from this study to increase funding sources and membership by focusing on individual donors and their contributions to nonprofit organizations.

Contributions and Recommendations

Information in this study adds to the field of nonprofit management and contributes to social change in support of specific strategies nonprofit leaders should implement to obtain and retain individual donors. Nonprofit organizations compete for donor funds and leaders with effective strategies can sustain organizational programs and

meet community needs. A key step in the development of effective donor retention is the assessment of organizational performance and capabilities in meeting organizational goals. Nonprofit leaders should demonstrate effective processes, knowledge, and organizational management to attract donors and maintain steady resources.

The three main sources of funds for nonprofit organizations were private donors, philanthropic contributions, and government (Kim & Kim, 2016). Understanding the behaviors and value creation of these entities was important for nonprofit survival. The efficiency of operations and organizational performance measurements were key considerations for potential donors (Lee & Nowell, 2015). CCN's leaders recognized the importance of aligning organizational programs to match community needs and the expansion of funding sources to continue to provide necessary community programs. Continued assessment of CCN's program alignment with community needs will provide information on program impact and need. However, I recommended that CCN's leader focus on strengthening their internal processes, documentation strategies, and workforce learning to remain competitive. CCN's leaders developed a culture focused on organizational competencies beneficial to organizational confidence and building strong community relationships.

In this single case study, I explored some successful strategies nonprofit leaders used to obtain and retain individual donors. Study limitations included the use of a single case study and small sample size and highlights the need for additional research. Researchers should use this as a starting point for further research into strategies nonprofit leaders use to obtain and retain donors looking at other performance

measurements.

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Appendix A: Interview Protocol and Interview Questions

Interview Protocol

Primary research phenomenon under study

Nonprofit leadership strategies.

Introduction

Thank you for agreeing to participate in this study. You have been selected to participate because of your role in the organization. Participation is voluntary. Anytime during this interview, you can stop if you do not wish to continue. Interview should last no more than 15 minutes and consist of written and recorded transcriptions.

Primary research goals from interview

Successful strategies hospital leaders use to obtain and retain individual donors

Initial probe question

What is your role in the organization?

Targeted Questions

1. What is your role in the organization?
2. What strategies do you use to generate and maintain funding from individual donors?
3. How do you assess the effectiveness of the strategies to align financial performance, organizational goals, and individual donors' expectations?
4. What methods or processes do you use to transform your strategies to efficiently help generate and maintain funding from individual donors and other donors?
5. What strategies do you use to promote employee learning and growth in support of organizational goals and individual donor expectations?
6. What strategies do you use to improve individual donors' satisfaction or value?
7. What else would you like to add not previously addressed?
8. How do you manage organization information?

Wrap up question

Anything you would like to add or final thoughts?

Appendix B: DBA Research Agreement

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Individually Identifiable Health Information (the "Privacy Rule") issued under the federal Health Insurance Portability and Accountability Act of 1996 ("HIPAA"), which govern the use and/or disclosure of individually identifiable health information.

D. The Institution reserves the right to dismiss at any time any Student whose health condition, conduct or performance is a detriment to the Student's ability to successfully complete the Research at the Institution or jeopardizes the health, safety or well-being of any patients, clients or employees of the Institution. The Institution shall promptly notify Walden of any problem or difficulty arising with a Student and a discussion shall be held either by telephone or in person to determine the appropriate course of action. The Institution will, however, have final responsibility and authority to dismiss any Student from Institution.

E. The Institution and Walden shall each maintain general liability insurance (or comparable coverage under a program of self-insurance) for itself and its employees with a single limit of no less than One Million Dollars (\$1,000,000) per occurrence and Three Million Dollars (\$3,000,000) annual aggregate. Each party shall provide the other party with proof of coverage upon request.

III. STUDENT RESPONSIBILITIES

A. The Student shall agree to abide by the rules, regulations, policies and procedures of the Institution as provided to Student by the Institution during their orientation at the Institution and shall abide by the requirements of all applicable laws.

B. If applicable, the Student shall agree to comply with the Standards for Privacy of Individually Identifiable Health Information (the "Privacy Rule") issued under the federal Health Insurance Portability and Accountability Act of 1996 ("HIPAA"), which govern the use and/or disclosure of individually identifiable health information.

C. The Student shall arrange for and provide to Institution any information requested by Institution including, but not limited to, criminal background checks, health information, verification of certification and/or licensure, insurance information and information relating to participation in federally funded insurance programs.

IV. MUTUAL RESPONSIBILITIES

A. FERPA. For purposes of this Agreement, pursuant to the Family Educational Rights and Privacy Act of 1974 ("FERPA"), the parties acknowledge and agree that the Institution has an educational interest in the educational records of the Student participating in the Program and to the extent that access to Student's records are required by the Institution in order to carry out the Research. Institution and Walden shall only disclose such educational records in compliance with FERPA.

B. HIPAA. The parties agree that, if the Institution is a covered entity under HIPAA:

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(1) Where a Student is participating in Research that will require access to Protected Health Information:

(a) Student shall be considered part of Institution's workforce for HIPAA compliance purposes in accordance with 45 CFR §160.103, but shall not otherwise be construed to be employees of Institution;

(b) Student shall receive training by the Institution on, and subject to compliance with, all of Institution's privacy policies adopted pursuant to HIPAA; and

(c) Student shall not disclose any Protected Health Information, as that term is defined by 45 CFR §164.105, to which a Student has access through program participation that has not first been de-identified as provided in 45 CFR §164.514(a);

(2) Walden will never access or request to access any Protected Health Information held or collected by or on behalf of the Institution that has not first been de-identified as provided in 45 CFR §164.514(a); and

(3) No services are being provided to the Institution by Walden pursuant to this Agreement and therefore this Agreement does not create a "business associate" relationship as that term is defined in 45 CFR §160.103.

C. Publications. Students and Walden are free to publish, present, or use any results arising out of the Research for their own academic, instructional, research, or publication purposes. Students shall submit a draft of any proposed publication to Institution at least ten (10) business days prior to submission for publication, presentation, or use. To the extent Institution requires that Students enter into nondisclosure or confidentiality agreements, such agreements shall be subject to this Section allowing publication of Research results.

D. Institution and Walden will promote a coordinated effort by evaluating the Research at mutually agreeable times, planning for its continuous improvement, making such changes as are deemed advisable and discussing problems as they arise concerning this affiliation.

E. The parties agree that Students are at all times acting as independent contractors and that Students are not and will not be considered employees of the Institution or any of its subsidiaries or affiliates by virtue of a Student's participation in the Research and shall not as a result of Student's participation in the Research, be entitled to compensation, remuneration or benefits of any kind.

F. Institution and Walden agree that Student will have equal access to their respective programs and facilities without regard for gender identity, race, color, sex, age, religion or creed, marital status, disability, national or ethnic origin, socioeconomic status, veteran status, sexual orientation or other legally protected status. Institution and Walden will comply with all applicable non-discrimination laws in providing services hereunder.

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G. The terms and conditions of this Agreement may only be amended by written instrument executed by both parties.

H. This Agreement is nonexclusive. The Institution and Walden reserve the right to enter into similar agreements with other institutions.

I. This Agreement shall be governed by the laws of the State of Minnesota.

J. Any notice required hereunder shall be sent by certified or registered mail, return receipt requested and shall be deemed given upon deposit thereof in the U.S. mail (postage prepaid). Notices to Walden shall be sent to Jenny Sherer, Office of Research Ethics and Compliance; 100 Washington Avenue South, Suite 900; Minneapolis MN 55401 with a copy to: Walden University, LLC; Attention: Assistant Divisional Counsel; 650 South Exeter Street; Baltimore, MD 21202.

K. Each party agrees to indemnify, defend, and hold harmless the other from all losses or liabilities resulting from the negligent acts or omissions of the indemnifying party and/or its employees or agents arising out of the performance or the terms and conditions of this Agreement, except to the extent such losses or liabilities are caused by the indemnified party's negligence or willful misconduct.

L. This Agreement sets forth the entire understanding of the parties hereto and supersedes any and all prior agreements, arrangements and understandings, oral or written, of any nature whatsoever, between the parties with respect to the subject matter hereof. This Agreement and any amendments hereto may be executed in counterparts and all such counterparts taken together shall be deemed to constitute one and the same instrument. The parties agree that delivery of an executed counterpart signature hereof by facsimile transmission, or in "portable document format" (".pdf") form, or by any other electronic means intended to preserve the original graphic and pictorial appearance of a document, will have the same effect as physical delivery of the paper document bearing the original signature.

SIGNATURE PAGE FOLLOWS

WALDEN UNIVERSITY

IN WITNESS WHEREOF, the parties hereto have duly executed this Agreement, effective the date first above written:

INSTITUTION

WALDEN UNIVERSITY, LLC

By: [Signature]
(signature)

By: [Signature]
(signature)

Name: [Signature]
(Print name)

Name: L. Ward Ulmer PhD
(Print name)

Title: Executive Director

Title: Vice President

Date: 10/4/16

Date: 3/17/2017