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Strategies for Succession Planning and Leadership Training Development for Nonprofit Organizations

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

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MS, Keller University, 2011

BS, DeVry University, 2008

Doctoral Study Submitted in Partial Fulfillment

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Abstract

Many leaders of nonprofit organizations (NPOs) lack strategies to replace leaders who leave the organization. An organization is in jeopardy of survival without an effective leadership development and succession planning strategy. The purpose of this single case study was to explore strategies NPO leaders use to develop future generations for leadership roles within the organization. Data were collected from face-to face semistructured interviews with 4 executives and 2 directors of a NPO in Texas and a review of documents including organization manuals, organizational charts, the employee handbook, and a management-in-training course. The human capital theory and succession theory were used as the conceptual framework for this study. Yin's 5-step process guided the data-coding process, and member checking was used to validate transcribed data. Data analysis consisted of coding, thematic analysis, and key word analysis, which resulted in 4 major themes: the need for a formal succession plan, removal of barriers to succession planning, investment in human capital, and practices and processes for succession planning. The implications of this study for social change include contributing to the organization's stability and profitability, which might allow the organization to provide services for the community and continue the development of human capital. Nonprofit leaders can benefit from the findings of this study by developing sustainable practices and improving strategies to implement succession planning.

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Dedication

All that I am and strive for in life is dedicated to the honor and glorify my Lord and Savior Jesus Christ. I am blessed that God saw fit for me to make it through this journey. I would like to dedicate my doctoral study to my mother, Paula E Stephens. My mother passed during my doctoral journey, which was a difficult time me. Words can't express the appreciation and love I have for my mother. I know she is looking down and smiling because I made it. I love you and thank God for allowing me the privilege and honor of having you in my life. I would also like to dedicate my doctoral study to all those who encouraged me and in honor of a dear friend, a mentor, and a person with a big heart, Dr. Laura Jean Holcombe. Your unconditional support without question was outstanding. I could never pay you back for all you have done besides finish this journey as you instructed me to do on many occassions.

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A special thank you to Dr. Marilyn Simon for your dedication to making sure I survived and completed this journey. Your patience when things looked dark and you continued to encourage me. Thank you for never giving up on me. I am forever grateful for level of commitment by Dr. Simon to ensure that I succeed. I would also like to thank my committee members Drs. Ify Diala and Scott Burrus. Thanks to my APA coach, Toni Williams, for her unwavering support and feedback.

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Section 1: Foundation of the Study

Nonprofit organizations (NPOs) are a major part of the social makeup in emerging and established economies (Hudson, 2005; Weerawardena, McDonald, & Mort, 2010). Leadership has a critical role in the performance of organizations, whether the organizations are NPOs or for-profit organizations (FPOs). Leadership is more than just a single position; it includes all parties involved in leading an organization. Religious and charitable NPOs have historically served as society's conduit for giving and for altruistic behavior (DiMaggio & Anheier, 1990). The aim of this qualitative single case study was to provide strategies that leaders of NPOs can use to develop the future generation of leaders and prepare them to assume leadership roles (succession planning) within the organization.

Background of the Problem

Many NPO leaders face a lack of direction and talent throughout the organization (Kramer & Nayak, 2012), a lack of strategy and sustainability in leadership succession plans (Al-Tabbaa, Gadd, & Ankrah, 2013), and a lack of financial support from donors that makes them dependent on government intervention (Stid & Shah, 2012). The success of an organization depends on the abilities, experiences, and capabilities of its leadership (Ready & Conger, 2003). Some NPO leaders search for external candidates to help them remain competitive, whereas others prefer to promote internally (Johannessen & Skålsvik, 2013). Chief executive officers (CEOs) play a vital role in defining an NPO's place in the community (Froelich, McKee, & Rathge, 2011). In theory, CEOs are responsible for what an organization does or fails to do (Froelich et al., 2011).

Organizations need competent leaders who are aware of social and financial responsibilities (Hind, Wilson, & Lenssen, 2009). Some form of leadership development is necessary for an organization to survive in a sustainable way. Leadership is a necessity for sustainability. An NPO's future relies on training employees to cope with continuous changes in the work environment (Laff, 2008) and engaging executives, boards, and stakeholders in executive succession planning (Cornelius, Moyers, & Bell, 2011), but the leaders of many NPOs are struggling to cope with a decrease in funding and with providing services within communities (Kahnweiler, 2013).

The inability to balance available funds with the needs of the mission is one of the primary issues involved with managing NPOs (Chetkovich & Frumkin, 2003; McDonald, 2007). High-profile financial fraud in some NPOs has led to public skepticism, reduced giving, and diminished NPO performance (Alexander, 2010). Leaders of NPOs should be aware of other NPOs that are trying to fill the same space. To keep NPOs viable in the community, strong continuous leadership is necessary (Morino, 2011).

Problem Statement

Succession planning is a major concern for NPOs in the United States, but many NPO leaders fail to develop the pool of talented future leaders needed to undergird effective succession planning (Landles-Cobb, Kramer, & Milway, 2015). In a global survey of 381 NPOs, including the United States, 74% of the NPOs claimed they lacked a leadership succession plan (Santora, Sarros, Bozer, Esposito, & Bassi 2015). The general problem is the lack of leadership development and succession planning in NPOs. The specific business problem is that some NPO leaders have limited strategies for developing the future generation and preparing them to assume leadership roles within the organization.

Purpose Statement

The purpose of this exploratory single case study was to explore strategies that NPO leaders use to develop future generations and to prepare them for leadership roles within organizations. The target population consisted of leaders in a nonprofit organization in Houston, Texas, who developed strategies for forming future leaders within their organization. This study has a strong potential for positive social change in helping NPO leaders strategically develop future leaders to maintain their charitable missions. The implication for positive social change is the potential for NPOs to develop strategies to improve performance practices and actuate their mission to better society. Leaders might use the findings to improve sustainability.

Nature of the Study

The method for this study was qualitative. The three types of research methods available to researchers are quantitative, qualitative, and mixed methods (Venkatesh, Brown, & Bala, 2013). A qualitative research design includes the collection, analysis, and interpretation of narrative and visual information (Simon & Goes, 2013). The quantitative research method is the collection and analysis of numerical data to describe, explain, predict, or control phenomena of interest, which was not the focus of this research. I selected the qualitative research method to explore strategies used by NPO leaders to develop the future generation and prepare them to assume leadership roles within the organization. Quantitative research includes statistics, numerical data, and hypotheses for testing purposes (Simon & Goes, 2013). The quantitative research method involves collecting and analyzing numerical data to describe, explain, predict, or control the phenomenon of interest (Morse, 2015), which was not the focus of this research. A mixed–methods study includes both quantitative and qualitative data collection and analysis (Anderson, Leahy, DelValle, Sherman, & Tansey, 2014), which was not appropriate for revealing the experiences business owners used to avoid permanent business closure in the aftermath of a natural disaster. Qualitative exploratory research involves using semistructured interview questions to gather detailed data that lead to open-ended responses (Morse, 2015).

A case study involves interviews and open-ended questions to obtain information about a topic under study (Yin, 2014). Case study research involves how and why questions, for example, how and why some organizations decide to invest in training (Pettigrew, 2013; Yin, 2014). A case study is suitable to explore strategies and training plans NPO leaders use to prepare future leaders of an organization.

A phenomenological design is an approach in which researchers explore and describe the lived experiences and perceptions of a group of people around a phenomenon (Kruth, 2015). This design was not appropriate for this study because the intent was to understand how leadership and succession programs work rather than how they are perceived by individuals. Ethnography is the study of shared patterns of language, beliefs, and behavior within a cultural phenomenon (Kruth, 2015), which was not the focus of this study. The intent of grounded theory study is to develop theories and to use empirical analysis to reinforce the theories (Goulding, 2017). This study did not have a focus on theory discovery, but I did focus on strategies used by leadership personnel.

Research Question

What strategies do NPO leaders use to develop future generations and prepare them to assume leadership roles within the organization?

Interview Questions

I used the following semistructured interview questions so participants could explain their experience in depth regarding strategies used to develop human capital and future leaders. The questions determined that there was a need for more information and confirmed why the information was important. Responses to the questions helped elucidate the strategies of succession planning and leadership development within specific organizations.

1. What was included in your strategic plan for succession planning?
2. How have you, as a business leader of an NPO, participated in developing the future generation of leaders in your organization?
3. What processes have your organization used to find leaders?
4. What have been some of the effective processes used in your organization for leadership development?
5. What factors were considered in the succession plans in your organization?
6. Please elaborate on different strategies your organization might enact to prepare future generations in assuming leadership roles within your organization.

7. What other information, if any, would you like to share concerning how you find and develop leadership within your organization?

Conceptual Framework

After reviewing different business theories relating to succession planning, two theories materialized to construct a conceptual framework for this purposed study: the theory of human capital (Becker, 1964) and succession theory. Human capital theory refers to developing current and future leaders' skills, knowledge, and comparable characteristics in response to human capabilities while the leaders continue to be productive at work (Schultz, 1961). According to Becker (1964), human capital is one of the best investments organizational leaders can make, and leaders must develop human capital to ensure growth in any industry.

As applied to this study, human capital in the succession planning process is critical to the sustainability of the organization. Human capital is one of the most valuable assets an organization possesses. The value in human capital should be treated with care (Crews & Scherron, 2013). Human capital is an investment for any organization. The knowledge obtained, preserved, and transferred is a benefit for the successor in a leadership role (Tunheim & McLean, 2014).

Fundamental to succession theory is an underlying philosophy that executive management must develop human capital for sustainability, the organization, and stakeholders. Succession planning and leadership development are critical to all organizations, yet the leaders of many NPOs have little no interest in succession planning (Froelich, McKee & Rathge, 2011). The framework is appropriate for those business leaders exploring complex phenomena involving succession planning and leadership development. The diverse nature of NPOs provides a framework for investigating why executives are not necessarily open to succession planning.

Definition of Terms

This study included the following operational definitions:

Leadership: Leadership is a process whereby an individual influences a group of people to achieve a common goal (Northouse, 2007).

Nonprofit organization (NPO): A corporation or an association whose leaders conduct business for the benefit of the public without shareholders and a profit motive (Chastain, 2013).

Organizational change: Organizational change involves making changes to an organization that will affect the way individuals and groups operate and interact (Schwartz, 2013).

Replacement planning: Replacement planning is a process of identifying short-term or long-term backups so that organizations have people who can assume responsibility for critical positions during emergencies (Rothwell, 2011).

Succession planning: Succession planning is the process of optimizing the identification, development, and placement of leadership talent (Masthan Ali & Premchand Babu, 2013).

Transactional leadership: Transactional leadership is a leadership style based on meaningful exchanges between leaders and followers. Transactional leaders enter a contractual agreement in which followers perform duties that meet specified objectives.

Transactional leaders also lead using rewards and punishment (Avolio, Bass, & Jung, 1999).

Transformational leadership: Transformational leadership involves using empowerment and a shared vision to embrace the transcendence of self-interests. Transformational leaders are agents of change who motivate and influence followers toward high performance that meets or exceeds organizational objectives (Bass, Avolio, Jung & Berson, 2003).

Workplace innovation: Workplace innovation refers to the implementation of new and combined interventions in the fields of work organization, human resource management, and supportive technologies (Pot, 2011).

Assumptions, Limitations, and Delimitations

Assumptions

Assumptions are circumstances that are out of a researcher's control, but if they are not present in a study, the research becomes irrelevant (Simon & Goes, 2013). An assumption is a belief that something is true without validation (Wahyuni, 2012). An assumption provides the foundation to conduct research (DeSimone & Buzza, 2013). The primary assumption was that participants would respond honestly without bias. Since participation was voluntary and the identity of participants and the organization were confidential, this assumption was likely met.

Limitations

Limitations are potential shortfalls within a study and are out of the researcher's control (Simon & Goes, 2013). A small sample size was a limitation of this study;

research findings may not apply to a broader population when a small sample size is used (Button et al., 2013). Participant and researcher bias is another limitation (Simon & Goes, 2013). Participants' biased responses to interview questions and a researcher's biased interpretation of the data could influence research findings (Yin, 2012). I used bracketing to set aside preconceived perceptions to mitigate bias. Other limitations in place for this study were out of my control, such as time, convenience, and the ability to a take a broad view of the findings based on the chosen population and sample. The workplace environment and interruptions may affect the flow of the interviews (Wiederhold, 2014).

Delimitations

Delimitations are boundaries for the scope of a study set by the researcher (Simon & Goes, 2013). Reality and observation define the study delimitations. Delimitations are in a researcher's control. The population size, data collection process, and time constraints bound the scope of the study. Delimitations give structure to research, and study images classify case (Yin, 2013). This study was delimited to NPOs in Houston, Texas. Only leaders and managers participated in the study. Excluded from this study were any for-profit businesses.

Significance of the Study

The results of this study could be valuable to NPOs. The research of succession planning strategies and leadership development could assist NPO leaders who fail to recognize succession planning as a key component in sustainability. Leaders and employees of NPOs may benefit from this study by gaining an understanding of the importance of developing an organization's human capital for sustainability. NPOs have many distinct goals that separate them from one another; however, unlike for-profit businesses, NPOs are formed to benefit society in a tangible way.

Contribution to Business Practice

NPO leaders may benefit from the themes and innovations derived from this study. The findings of this study may contribute to the body of knowledge in the field by providing an understanding of the importance of developing an organization's human capital for the future. For NPOs to survive, their leaders need various management methods and skills, strategic creation, and, most of all, strategic leadership (Stumpf & Mullen, 1991).

Implications for Social Change

This exploratory single case study has the potential for positive social change by providing strategies to develop new leadership in the NPO sector. Each NPO has a unique business mission, but all have goals to improve society. NPOs are the heartbeat to society and essential to communities (Xie & Bagozzi, 2014). There is a need for NPO leaders to develop future generations of leaders and prepare them to assume leadership roles within the organization. Society, in general, could benefit by current NPO leaders proactively identifying and developing new leaders to succeed them (Dobrai & Farkas, 2016). By so doing, NPOs can continue to fulfill their charitable missions.

A Review of the Professional and Academic Literature

The purpose of this exploratory single case study was to examine the effect of succession planning and leadership development on future leaders in NPOs in Houston, Texas. To understand the effect of human resource management on the effectiveness of an organization, it is necessary to understand the process of developing human capital and identifying appropriate training strategies by evaluating occupations and tasks. The focus of the study was the perspectives of executives with leadership experience in NPOs regarding succession planning. The literature review includes five primary topics: characteristics of leadership, strategy for leadership development, employment training strategies, succession planning, and considerations specific to the nonprofit environment.

Title Searches, Articles, Research Documents, and Journals

The literature review for this study involved using multiple databases from Walden University's library, including Business and Management, ProQuest, Google Scholar, Sage Journals Online, Business Premier Source, and EBSCO. Other sources used for this review included Walden University's document delivery service. The literature review included a review of works completed by other scholars about training and development and a consideration of other studies in the area of leadership development. The information and sources reviewed included peer-reviewed journals, doctoral dissertations, books, Internet websites, and reports on the subject of training and development in NPOs.

The literature review consists of 320 articles, including 280 peer-reviewed articles published between 2014 and 2018 and 39 published in 2012 or earlier. I also used 32 books to compose the literature review. The percentage of peer-reviewed articles included in the literature review published within 5 years of anticipated graduation in 2018 is 90%.

Characteristics of Leadership

Leadership is necessary for continued success in any organization (Palumbo, 2016). Professional development for all leaders is essential to growth in an organization (Popescu, 2013). A true leader is more than a person giving instructions and leading others. A true leader recognizes all employees and shows respect for each individual (Hitka & Balazovz, 2015). Many people can make important contributions to organizations and society by not being in a leadership role. Effective leaders recognize that training is necessary for all employees, and organized leadership training should be a requirement.

A leader's responsibility to the organization is to serve as a resource to help employees achieve the objectives for which the leader holds them accountable. Accountability means a leader must identify the strengths and needs that followers bring to tasks and responsibilities that link to business outcomes and objectives (Bozer, Kuna, & Santora, 2015). An organization that lacks a global focus, sustainable organizational performance, supportive management practice, and organizational motivation is an organization without effective leadership (Tonkham, 2013).

Situational leadership. Another term used to describe situational leadership is the contingency theory (Amanchukwu, Stanley, & Ololube, 2015). This type of theory has attracted researchers for many years. The contingency theory includes an emphasis on a given situation and on the characteristics of how a leader will function (Fiedler, 1967). Thus, the situation determines how a manager will respond to certain circumstances. The situation at hand will determine a leader's response. Situational leadership centers on the tasks given by a leader and the way followers respond to those tasks (Thompson & Glasø, 2015).

The effectiveness of leadership is critical to the performance of employees (Pitts, 2013), especially in the NPO sector. Finding the right talent is challenging, and searching for the right person for the right position can be even more challenging. NPOs play a vital role in society, as they provide services and charity for communities. When facing everyday challenges, NPO leaders should be able to respond to all types of environments and people. Many NPOs lack leaders who have the ability to make difficult decisions.

Complexity science is an additional resource to help understand leadership and its value to organizations (Thompson & Glasø, 2015). Having knowledge and understanding of leadership components is an added advantage for any organization. Exceptional leadership adds value to an organization's mission, vision, and culture. A leader of the present-future should be able to adapt to many different leadership styles. Leadership is most important when it comes to managing an organization. Leadership differs than management and requires leaders to be trained to handle different situations (Palumbo, 2016).

Servant leadership. Servant leadership represents some basic parts of leadership that are significant for firm performance (Huang, Li, Qiu, Yim, Wan, 2016). NPOs' struggle to retain capable leaders who look at the for-profit sector as a chance to propel their career. Little is thought about the pertinent attributes that recognize the viable leader in the nonprofit sector (Zeinabadi, Yasini & Mirhadian, 2016). Some followers become reliant on the servant leader rather than being empowered, unwilling to embrace proactive conduct to meet the organizational instances. Researchers are steady in asserting that leadership is a basic achievement factor for NPOs (Palumbo, 2016).

Transformational leadership. Transformational leadership is one of the most effective styles of leadership (Belias & Koustelios, 2014). Transformational leaders can lead others but also have the ability to lead themselves (McCleskey, 2014). Transformational leadership happens when leaders consider the emotions and values of their employees (Belias & Koustelios, 2014). Transformational leaders also create a planned vision that enlightens all those involved in the strategy of the organization, and they look for a commitment to the vision (Mokhber, Ismail, & Vakilbashi, 2015).

Transformational leaders encourage followers to take ownership and, while doing so, advance their ideas and agenda for success (McCleskey, 2014). Transformational leadership is primarily about a team's development and creating an environment of innovation and creativity. Transformational leadership is for the greater good, and transformational leaders consider the critical role that trust plays in employee engagement (Reunanen & Kaitonen, 2017).

One characteristic of transformation leadership is sharing the vision of the leader with others (Brown, 2014). Transformative leaders effectively communicate with employees (Mazzei, 2014) and have a relationship with their human capital, which has an effect on workplace attitude, employee conduct, work–life balance, and employee turnover (Trmal et al., 2015). Transformational leadership improves employee morale and motivation (Gupta, 2015), which influences employee performance and supports career development (Korsakiene, Stankeviciene, Simelyte, & Talackiene, 2015).

Five major components of transformational leadership encourage participation by employees: (a) leaders' influence on the employees, (b) leaders' behavior, (c) leaders' studious motivation, (d) leaders' encouragement, and (e) individual relationships with leaders (Sahin, Çubuk, & Uslu, 2014). Leaders who display transformational leadership characteristics become warriors of change within organizations by empowering employees and transforming the vision (Yahaya & Ebrahim, 2016). Regardless of leadership style, leaders with influence over employees usually have some characteristics of charisma, which is a style that is about personality and captivation (Effelsberg, Solga, & Gurt, 2014).

Transactional leadership. Transactional leadership is a valuable concept and suitable style of leadership during select situations in the workplace (Mgeni &Nayak, 2016). Transactional leaders reward followers who perform tasks or reach a certain level and punish those who do not. Transactional leadership behavior is contingent upon the behavior of the employee, which reflects a difference between transactional and transformational leadership. Transactional leadership theory is comparable to contingency theory because of the focus on the obvious and implied relationship between employees and leaders (Girma, 2016).

Many organizations have a clearly defined mission and vision; however, mission and vision are not necessarily the focus of transactional leadership (Bass, 1995). A transactional leader focuses primarily on productivity and maximizing output rather than on innovative initiative (Mohamad & Yahya, 2016). Transactional leaders use rewards that are contingent on the performance of the employees. Transactional leaders also offer rewards for completing tasks (Tyssen et al., 2014).

Strategy for Leadership Development

Leadership. The idea of leadership is ephemeral. One characterization of a leader is a person who can motivate others, and a leader is sometimes comparable to a hero in a movie or story. Some authors have contrasted leadership to management by describing a leader as more of a persuader and a manager than an intimidator (Phillips & Phillips, 2014). The need for a leadership construct continues to grow throughout different industries, organizations, professionals, experts, and academics (Kilkelly, 2014).

The theory known to many as the great man theory includes the idea of a leader being born and not taught (Eisenberg et al., 2015). Another way for leaders to develop their leadership skills is through on-the-job training. On-the-job training can provide leaders and employees with benefitted developmental activities. Many leaders and most followers understand that leadership is about managing change (Kilkelly, 2014).

Effective leadership and managing organizations is an ongoing process, and poor employee performance in many NPOs makes leadership more important than in FPOs (Eisenberg et al., 2015). Some descriptions of leadership echo the notion that leaders should have the talent and ability to provide guidance, eliminate inconsistencies, and create a climate in which people can excel and advance within the organization (Hujala & Viitala, 2014). A difference exists between leadership coping with change and management managing the change. Managers manage the strategic focus within organizations, which includes planning, organizing, and budgeting (Pradhan & Pradhan, 2015).

In the NPO and FPO sectors, many corporations have experienced challenges due to poor leadership and a lack of accountability, and the nonprofit sector has struggled for years due to a lack of leadership development, accountability, and succession planning. The lack of leadership affects the principles of the organization, the value of performance, and plans for success (Phillips & Phillips, 2014). Organizations lack transparency and accountability to shareholders, donors, and the community. The basis for the lack of training and development is leaders not understanding what leadership training involves and not knowing the difference between a manager and a leader (Phillips & Phillips, 2014).

A challenge facing the leaders of many NPOs is a decrease in leadership personnel, vision, and strategic perspective (Reunanen & Kaitonen, 2017).
A reduction in financial support from the government and donors is a contributing factor to organizational leaders failing to hire the right talent (Cox, Hannif, & Rowley, 2014). Financial stability is important when trying to hire the right person or persons to lead an organization. The complexity of NPOs requires someone with a diverse background, strong leadership skills, an understanding of the enterprise, the ability to work across boundaries, and knowledge of how to grow the business through executive communication, financial planning, and strategic planning (Palumbo, 2016).

Leaders rely on others following their guidance (Pauliene, 2013). Leadership refers to the idea that someone can lead others to a specific task or goal. Leadership focuses on influence and the impact a leader has over human capital within the organization (Cherry, 2013). Buy-in by the people will determine the influence a leader has within an organization. Relationships between leadership styles and successful NPOs have not received the attention they deserve.

Leaders of successful businesses involve everyone's understanding why they are in business and in planning how to move that business forward. Being a leader and demonstrating leadership involve being a motivator and inspiring those in the organization. Effective change management reflects the strategy and talent management of a real leader (Yahaya & Ebrahim, 2016). Leadership styles differ across the spectrum and situation. Leaders must carry out specific tasks that require different behaviors and handle situations that arise (Phillips & Phillips, 2014).

Leaders should be good at training their employees to be good followers. Followers need to have a good sense of judgment and enthusiasm. By building trust, leaders can communicate their ideas effectively and transfer their vision to followers (Palumbo, 2016). However, organizational leaders often struggle to communicate the need for change (Kilkelly, 2014).

Common factors that characterize leaders include (a) strategy and vision, (b) communication and information, (c) authority and responsibility, (d) creating a learning culture, (e) engaging, (f) plainness and simplicity, (g) humanity and trust, (h) walking around, and (i) reflective personal leadership (Larsson & Vinberg, 2010). However, Mathieu, Fabi, Lacoursiere, & Raymond, (2015) failed to mention research regarding how leaders should not conduct themselves. Effective leadership starts with individuals believing in their abilities and themselves. Effective leadership balances qualities that present employees with inward and outward skills. Effective leaders maintain necessary and essential organizational elements while initiating required changes within employee procedures to reach objectives (Reunanen and Kaitonen (2017).

The style of leadership is important, as effective leadership can be vital to success. Prior research has shown that supportive leadership has a better effect on the environment, more engagement, and greater inspiration of employees (Fusco, O'Riordan, & Palmer, 2015). Effective leaders depend on effective organizational cultures and the ability to improve performance (Batool, Khattak, & Saleem, 2016). Organizational leaders expect managers' abilities to vary, and their styles should apply to the situation at hand. The right leader will support enforcing strategic initiatives within an organization (Phillips & Phillips, 2014).

Leadership development. Organizational leaders tend to provide leadership development as a separate entity. Leadership development is one way to provide sustainable solutions to an organization and diminish some of its strategic challenges (MacKie, 2014). Benefits associated with leadership development include increased productivity, improved bottom line, and greater knowledge (Clarke & Higgs, 2016); however, many NPOs do not have such training resources for employees (Hopkins et al., 2014). Organization and planning are strategies necessary for organizational success in the field of management.

The management of people has become strategic in its significance, and the focus of its outlook is attracting, retaining, and employing the right people. Managers' needs may not connect with organizational needs (Eken, Ozturgut, and Craven, 2014). Hiring the right people and making sure a person is right for a role is part of the strategy.

The population of the world is changing, and people are living longer (Ng & Feldman, 2013). Many people want to work to an older age, which creates more competition with younger workers. Global life expectancy in 1950 was approximately 48 years old, and it reached 68 years of age in 2010 (Roberts, 2011). With the improvements in technology and health care worldwide, life expectancy is likely to increase to 76 in 2050 and 81 years in 2100 (Bloom, 2011). As life expectancy increases, organizational leaders will need to provide support in some capacity to help the aging workforce (Truxillo, Cadiz, & Hammer, 2015).

Analysis revealed flaws in most commentaries on whether the aging workforce threatens a nonprofit leadership crisis within a theoretical framework of supply and demand in the market for nonprofit executives (Eken, Ozturgut, and Craven, 2014). Based on global dynamics within businesses, managers and leaders must make strategic adjustments to compete and sustain organizations. The attention given to the topic of aging workers has increased and become a central focus for organizations (Wang, 2015). Leaders of NPOs still view the aging workforce adversely, which causes some leaders to concentrate on the lack of experience by the new generations instead of on providing solutions to overcome the decline of the mature generation of workers (1925 and 1945) and the other group known as the baby boomers (1946 and 1964).

Research on leadership development extends back far more than a century (Avolio, Reichard, Hannah, Walumbwa, & Chan, 2009). No leaders are the same, and neither are their styles of leadership. Due to the constant changes in people and the work environment, leaders should exhibit some ability to handle different situations and have the mind-set of knowing how to approach situations. Leaders of NPOs who practice leadership development are increasing their organization's worth and sustainability (Galli & Müller-Stewens, 2012).

Leaders of NPOs need to develop future leaders to provide vision and guidance to sustain organizations. One of the characteristics of leadership development is someone who can motivate teams, develop others, and develop leaders (Helmig, Ingerfurth, & Pinz, 2014). Leadership development requires a return on investment. Research has shown that NPO leaders located in the United States tend to spend less than 10% focusing their time on developing their human capital (Mazzei, Flynn, & Haynie, 2016).

Leadership development is about facilitating relationships and improving employee performance, but high turnover continues to be a problem (Mahdinezhad et al., 2013). Developing the right people and having support in transition are important as the workforce changes. Leadership development should involve focusing on developing and defining expectations (Pauliene, 2013). The challenge is limited training opportunities for leaders and managers of NPOs (Austin, Regan, Samples, Schwartz, & Carnochan, 2011) due to scarce resources in an uncertain economy (Hailey & James, 2004).

Leadership development involves improving the quality of leaders and training them for success (Groves, 2007). Approximately 87% of the increased employment in NPOs between 2004 and 2014 was due to health care, education, and social services, which is a primary focus of NPOs (Hopkins et al., 2014). The retirement of many NPO leaders led to a leadership deficit because of the lack of succession planning and leadership development of small business leaders. Researchers indicated that NPO leaders would need to staff approximately 80,000 new senior leaders by 2016 due to the changes (Bridgespan Group, 2012; Center for Creative Leadership, 2012).

Effective leadership development is necessary due to changes in organizational structure (DeRue & Myers, 2014). The results of one survey showed that many organizations have a lot of available talent (Amagoh, 2009) because the leaders in those organizations integrate leadership development as part of the organizational culture, which enhances leadership effectiveness. Organizational culture affects business success (Khana & Afzalb, 2011) and the relationship between customers and organizations.

Assessing the skills and knowledge of those in leadership positions and assessing what is necessary to improve performance is important (Josan, 2013). Furthermore, assessing needs and proactively addressing those needs add viability to an organization. Leaders need to be aware of unengaged employees and the ways they can influence others adversely. Employees sometimes find the means to deviate from an organization's objectives without breaking any of its norms (Bryant & Higgins, 2010). Partnerships between companies and staff can increase returns on investment (Davenport, 1999).

Finding individuals with the right talents and skills to make a business flourish is important. Organizational leaders must know what to do with their talent to be successful (Karimi, Malik, & Hussain, 2011). Training and development are keys to retaining talent, ensuring succession planning, and maximizing profitability. Although many organizational leaders are mindful of the cost to retrain, no organization can afford not to train and develop its staff. Most employees want to do well, but do not know how to do things or where to get the resources to assist them in their effort (Josan, 2013).

Management’s role throughout the training and transfer process is important. One way to motivate employees is to inspire and energize the management and the staff to increase performance and productivity (Pinho et al., 2014). Managers should make all team members feel comfortable by introducing team-building exercises and opening lines of communication and collaboration. Additional research is necessary to investigate employee feelings in multicultural environments further (Boros, Meslec, Curseu, & Emons, 2010).

Differences in education, culture, and other factors influence facility, supplier, and employee perspectives on sustainability (Millar, Hind, & Magala, 2012). Organizational culture and training and development programs have unbreakable links (Kissack & Callahan, 2010). The culture of an organization molds and shapes these programs, which in turn influences the organizational culture, as the programs do not exist in a vacuum. Effective communication and collaboration among various segments of an organization are necessary to address cultural differences and ensure everyone has an adequate understanding and acceptance of coworkers’ cultural beliefs (Castaneda & Bateh, 2013).

Integrating and planning for social risk factors is important in established organizational costing and risk-management systems (Epstein, 2008). Employee incentives and rewards are useful for improving corporate sustainability. Measurable sustainability is also important. Leadership development should show that management is successful within the organization and that return on investment demonstrates noticeable changes in the individuals receiving training (Pilcher, 2012).

Organization Strategies for Succession Planning

Succession planning. Succession planning is a critical component of human resources. Leadership succession planning has been a topic of concern in the private sector since the 1980s (Zepeda, Bengtson, & Parylo, 2012). Successful organizations withstand the challenges involved with replacing the leadership and continue moving forward when faced with difficult situations (Conger & Fulmer, 2003). Succession planning prepares organizational leaders to face future challenges and remain viable. Such planning results in organizations having someone ready to step in should the need arise.

Organizational strategy is another important factor of succession planning (Quigley & Hambrick, 2012). Leadership succession is necessary for organizations (Grosu & Coretchi, 2011). Previously identified future leaders facilitate succession practices (Gothard & Austin, 2013; Kim, 2012; Zhang & Rajagopalan, 2010).
For organizations, characteristics and style of leaders form the way an organization will operate (Kilkelly, 2014). Organization leaders must do an outstanding job in planning for the future within organizations. Effective leaders observe employees and ensure employees are able to ensure the future of an organization. Succession planning ensures necessary human capital will be available when needed (Gandhi, 2014).

Due to the constantly changing work environment, organizational leaders must focus on developing the leadership functions necessary for sustainability (Hayek, M., Williams, W. A., Jr., Taneja, S., & Salem, R. (2015). Organization leaders are responsible for identifying the right subordinate as the successor. Succession planning involves preparing new leaders to take over organizations after leaders leave (Florea, Cheung, & Herndon, 2013). A national survey of 413 NPOs conducted by researchers at Nonprofit HR (2014) indicated that 33% were operating with a succession plan in place, while another 14% were in the implementation stage. Results from the study revealed that leaders of one in three organizations had identified their new leader through succession planning (Thiessen, 2012).

Succession planning requires a central focus and an understanding of an organization's strategic direction (Flynn, 2014). Strategic guidance is necessary before implementing and operating a succession planning process. Succession planning has contributed to the success of many organizations, and a lack of succession planning can have negative effects. The lack of succession planning in some NPOs leads to questions regarding the viability of these organizations (Gothard & Austin, 2013). Formal succession planning processes are rarely part of strategic planning in NPOs (Barten, 2012).

NPOs lack talent management practices globally (Datt & Riveria, 2013). Formal succession planning should be a part of NPOs' development and processes. However, NPOs are often at a disadvantage, because succession planning is not a top priority. Many NPOs do not have people available who are fully able to assume top posts (Walker, 2014). This is due to the many different reasons such as funding issues, time constraints and issues with the selecting the most qualified candidate. An organization lack of focus on succession planning could impact the organization and its development of human capital.

Succession planning is essential for all organizations. Succession planning serves the purpose of training and guiding both current and future leaders of many organizations of all sizes (Kowalewski, Moretti, & McGee, 2011). Succession planning is essential for maintaining successes, transferring organizational knowledge, building skills, and continuing the mission of organizations (Braun, 2015). Succession planning is about transitioning from older leaders to the new generation (Cater & Kidwell, 2014).

Succession planning is also about preparing for the future. As the boomers retire, they leave behind vacant positions (Walker & Forbes, 2014). The leaders of many NPOs are not ready when employees leave long-standing positions. Approximately 83% of 300 organization leaders who participated in one study failed to have any documented succession plan in place (Cornelius et al., 2011). The sustainability of NPOs requires forward thinking and the continuous recruitment of highly talented performers to fill key positions.

Process of succession planning. Succession planning expands throughout organizations by teaching leadership skills, effective communication skills, leadership development, and other skills to engage employees (Gray, 2014). The dialogue on what causes turnover and the need for succession can be unpleasant. Situations can happen that are beyond anyone's control, such as unexpected resignations, unexplained or unforeseen deaths, planned retirements, or voluntary separations. A strategic and organized succession plan leads to a better leadership transition (Prestia, Dyess, & Sherman, 2014).

Succession planning should be a part of the organization’s strategy and a extension of the human resources department that is function of employee development (Sharma & Sengupta, 2017). The process of succession planning starts with the human resources as they should be tasked with all creating, developing succession planning programs. As part of the strategic plan, succession planning is a core function that is driven by strategies, training and development of employees that can negatively affect the organizations training investment. Succession planning is a method of developing employees and improving morale (Ognjenovic, 2015).

Many organizational leaders struggle to retain exceptional employees who have the potential to achieve the desired organizational objectives (Sherman, 2014). One reason for the struggle may be the lack of a mentor strategy. Mentoring involves identifying potential future leaders and providing a training plan and career growth opportunities for someone currently in an organization (Ognjenovic, 2015). Succession planning is a developing tool that provides organizations with a talent pool.

An environment that does not have a focus on learning can have high employee turnover because employees do not want a long-term commitment to the organization. Research has shown that employee promotions from within lead to better retention results (Gray, 2014). Placing unorganized employees in leadership roles could interrupt organizations’ efforts toward success and negatively impact (Kleinsorge, 2010). Organizational leaders need to avoid high employee turnover, morale issues, underperforming employees, and the loss of generational knowledge (Bennett, Pitt, & Price, 2012).

Employee turnover. Employee turnover can be harmful to any organization. The loss of an employee also results in the loss of knowledge in an organization, which can be detrimental to financial growth (Durst & Wilhelm, 2012). In a 2008 survey of employee turnover in the nonprofit sector, 81% of respondents reported that their organizational leaders were looking to fill a management or leadership position (Opportunity Knocks, 2008).

Employee perception of an organization is important (Shuck, Twyford, Reio, & Shuck, 2014). Organizational leaders understand that employee turnover will happen, but too much turnover can hurt an organization (Reh, 2014). Costs associated with employee turnover are high due to the recruitment and training of new hires (Zhang, Fried, & Griffeth, 2012). There is a global shortage of talented workers, and leaders in 34% of companies are having a difficult time finding knowledgeable or appropriate talent to fill open positions (Manpower Group Talent Shortage Survey, 2011).

How turnover affects the ability to move ahead within an organization remains unknown. Adding happiness to the work environment is a good way to maximize organizational productivity (Chaudhry & Shah, 2011), but happiness is an ephemeral construct. Sustaining positive employee morale is essential for a productive, sustainable, and available labor force (Asiyabi & Mirabi, 2012). High turnover seems to affect many NPOs, mostly in areas that are hard to staff or when matching the job responsibilities within the organization is not easy. One of the key ingredients to a successful NPO is the executive leadership team (Froelich et al., 2011). Communication opens the door for learning, learning is essential for businesses, and business leaders should have a developmental program in place.

The leaders of most NPOs emphasize recruiting the best managers who are highly educated, which results in a high turnover percentage for those organizations (Watson & Abzug, 2005). Leaders of NPOs are at a disadvantage regarding staffing due to the types of interested applicants and the lack of understanding of the industry. The leaders of successful organizations focus on building a comprehensive set of leadership development activities, as they support the diverse talent throughout their organization (Amagoh, 2009).

Leaders tend to lay off highly trained employees at a lower rate than they lay off new employees due to the benefits of human capital (Becker, 1993). Many leaders prefer to invest more in human capital than in the general population of the organization (Mincer, 1993). As long as an association exists among cost and human capital, training and development, and succession planning, employee turnover will be a substantial cost to organizations. A loss in revenue occurs when an employee leaves an organization (Palanski, Avey, & Jiraporn, 2013).

The organization's role. Succession is about the success of the organization, the people, and the mission and about continuing in the future. Board members, as well as executives and lower management, should support succession planning. Many NPO board members lack enthusiasm regarding the importance of succession planning (Groppe, Urbach, & Kutas, 2011). Executive leadership plays a major role in succession planning for NPOs (Vetter, 2012). Both executive leaders and lower management levels should have the same goals for staff development and the same continuity about competence, production, and effectiveness maintained throughout an organization (Wright, Stewart, & Moore, 2011).

The leaders of NPOs must have a plan in place for training, staffing, and sustainability so that the NPO can survive (Klein & Salk, 2013). The leaders of any organization who plan to increase their organizational success by competing with other agencies should plan for the short and long term. Those who choose not to plan will more than likely be reactive to the changes in the environment, society, staff, and industry (Grau, 2014). Effective succession planning is about the present, future, and resistance (Kalra & Gupta, 2014). Succession planning increases organizational leaders' ability to maintain an established workforce of employees ready for advancement should the need arise (Brochhaus, 2004).

Leaders of NPOs can build their present and future operations from the blueprints of competency models (McCallin & Frankson, 2010). These types of models define what leadership skills and characteristics are necessary for different management positions. The various types of models include business skills, development programs, job challenges, cultural competencies, organizational knowledge, transformation of knowledge, and organizational goals and missions (Dust et al., 2014).

Leaders of NPOs can also provide succession planning for employees in other ways. Training and mentoring programs are successful ways of developing personnel. For sustainability, NPO leaders must design, implement, and develop a succession plan that will help grow the organization for the future (Aragón-Correa, Martín-Tapia, &

Hurtado-Torres, 2013). Those considered for development programs might be employees at lower management levels (Hum, 2010). Working on group projects with experienced employees, or with generation groups that will be phasing out, is good developmental training (Succession Planning Team, 2011).

Organizational leaders can use succession planning to understand the importance of maintaining key positions and of quickly filling vacancies (Gandhi & Kumar, 2014). Succession planning involves a strategic approach for selecting an employee for the process and some in-depth training. Succession planning involves preparing selected employees to fill vacant positions when someone dies, retires, or leaves for other reasons. Many U.S. companies are not able to withstand the changes in workforce demographics and are unable to keep up with vacancies (Walker & Forbes, 2014).

Many NPO leaders are unfamiliar with succession planning, which leads to a lack of understanding and a need to improve perceptions on the subject (Ahern, 2015). Available information on succession planning indicates how executives and board members' decision-making influences the sustainability of an organization (Santora et al., 2014, p. 16). Leaders of FPOs usually navigate succession planning through the bottom line. In NPOs, the board of directors and leaders of other government groups that have a stake in the organization fill higher positions (Zhang & Rajagopalan, 2010).

When considering a succession plan, mirroring the vision and strategic plan of the organization is important. A link should exist between organizational culture and succession planning, where there is a flow within the organization (Valentine, 2012). The ability to retain, acquire, and share knowledge is essential to an organization's competitive advantage and is a good measurement of succession planning (Durst & Edvardsson, 2012). Knowledge transfer or knowledge sharing does not necessarily guarantee increased productivity or sustainability for an organization (Mäkeläa, Andersson, & Seppälä, 2012). Sustainability involves mutual collaboration from intellectual capital, transfer of knowledge, and succession planning (Durst & Wilhelm, 2012).

Another important factor in succession planning is the performance of leaders (Garg & Van Weele, 2012). Performance transforms an organization either positively or negatively. In addition to capital and technology, hiring the right talent is one of the most important considerations that organizational leaders face (Hamid, 2013). Succession planning ensures employees are available and ready when it is time to place them in major executive or staff positions. Many leaders choose not to engage in succession planning because they fear losing their positions, which can affect their performance (Cairns, 2011).

Succession planning has a relationship with leadership development (Nieh & McLean, 2011). Succession planning serves many purposes for organizations, such as training and development, employee morale and motivation, and ways to reduce high turnover (Nieh & McLean, 2011). Succession planning ensures someone will be ready to take over should the need arise due to retirement and any unforeseen issues (Zepeda et al., 2012). One purpose of succession planning is to prevent leaders from selecting unqualified successors to take over. Organizational leaders who incorporate succession planning increase employee morale and employee value and allow organizational change to flow (Fibuch & Van Way, 2012).

Many organizations do not have a formal succession plan (Personnel Decisions International Corporation, 2011). Succession planning is a systematic approach to identifying a leadership pipeline, develop talent pools at all levels, and assess potential (Couch, 2013). The successes and failures of an organization seem to have a relationship with the strategy of succession planning. Organizations need succession planning to continue in the present and future. Leaders of NPOs need to ensure all employees understand the mission, value, and vision; how important the management styles are to the organization; and how to advance through the organization (Crews & Richard, 2013).

Strategic planning. Strategic planning includes a vision for an organization and the direction an organization should go. Leaders use the vision to spark motivation, to keep the projects and changes aligned, as a filter to evaluate how the organization is doing, and as a rationale for the changes that the organization will undergo. When a vision is in place, members of an organization have a reason to succeed (Siciliano, 2006). Organizational leaders involved in strategic planning focus on tasks to help achieve desired results and evaluate an organization's current state and future (Kotter, 1996). Strategic planning is not perfect (Mintzberg, 1993). Factual evidence is still lacking in proving that strategic planning improves employee performance (Poister, Pitts, & Edwards, 2010).

The impact a strategic plan has on an NPO's performance is significant as it pertains to serving the needs of a community and helping organizational leaders manage more efficiently (Hu, Kapucu, & O'Byrne, 2014). A strategic plan is necessary to improve an organization's sustainability. Leaders of NPOs and FPOs both take strategic planning seriously and use tools to increase performance and maximize profitability. Regardless of an organization being an NPO or an FPO, strategic planning is vital to its survival (Mosley, Maronick, & Katz, 2012). NPOs can benefit from strategic planning (Kapucu, 2012). Leaders who create strategic management plans equip their organizations with tools to compete with or outperform the competitors (Cordeiro, 2013).

Strategic planning often includes a guide for organization that explains the goals of the company, how to attain the goals, how to make decisions, and how to allocate funds and resources to pursue these aims. Strategic thinking involves contemplating how a strategic plan comes together (Bryson, 2011). Strategic thinking is a psychological development that includes processing organization needs, strategic analysis, strategic planning, and strategic management (Aslani, Feizi, & Aslani, 2013).

The efforts of strategic planning can be time consuming and may cause an increase in spending funds that many NPOs are lacking (McHatton, Bradshaw, Gallagher, & Reeves, 2011). While attempting to recover from a difficult economic climate, the leaders of many NPOs are struggling with the decline of charitable giving, providing services, and maintaining volunteer services (Mosley et al., 2012). Strategic planning must be a focus in every organization, as it serves as a guide for success and sustainability (Abdalkrim, 2013). A sustainable organization offers goods and services for consumers and generates revenue (Patzelt & Shepherd, 2011). The mainstay for accomplishing business goals is to have a strategic business plan (Eddleston, Kellermanns, Floyd, Crittenden, & Crittenden, 2013). Leaders of NPOs must be confident that a strategic plan is in place and used to benefit the organization.

There is a need for NPO leaders to help their organizations become more efficient in their efforts to plan and train for the future. Leaders of NPOs need to redefine their purpose and mission (McDonald, 2007). Organizational leaders should focus on all aspects of an organization while optimizing the use and effectiveness of all its resources (Harrington, 2005, p. 107). To ensure future sustainability, pressure on NPO leaders to achieve the best results in performance through development is increasing (Cairns, Harris, Hutchison, & Tricker, 2005). Effective leadership can have the following effect on the work environment (Chaudhry & Shah, 2011).

Training and development. Changes in the economy challenge NPO leaders to increase their efficiency and competency while continuing to grant opportunities to employees (Kearns, Bell, Deem, & McShane, 2014). It is not clear how human resource practices affect specific organizational capabilities that contribute to improved firm performance (Wright et al., 2011). Training is an indispensable tool for building people and teams (Allan, 2008).

Developing talented individuals in a company involves more than just conveying information to them (Brown & Eisenhardt, 1995) and more than teaching them a few shortcuts along the way. Training and development mean supporting, coaching, and guiding talented individuals. Development means getting people to implement the skills and information they have learned to help them achieve goals for the organization they serve. There might also be goals that they want to achieve as individuals (Goleman, Boyatzis, & McKee, 2013). One of the purposes of training and development is to teach and learn new skills (Robineau, Ohana, & Swaton, 2014).

Many learning environments exist in the business world. Employees often have a choice on how they learn (Dunlap, 2015). The objective should be to learn, not to focus on where they learn. Although the classroom is the most traditional place to learn, there are other possible learning environments. For example, some group learning environments have couches and chairs but no tables, which creates an intimate environment to make the learners feel comfortable.

Training and development efforts are an investment for an organization. The purpose must be in the best interest of the organization, as either a short-term or a long-term process (Dunlap, 2015). The purpose of training employees is to teach them something new to enhance their capabilities and experience. Training and development support the transfer of training within an organization (Grossman & Salas, 2011).

Development is a term dedicated to the topics of organized or unorganized leadership and employees, as well as different industry or work environments designed to cultivate the skills of many different organizations' employees. Development should always maximize the potential and abilities of an organization (Mabey, 2013). If there is accountability, there is implementation. Implementation creates new practices, flexibility, and self-directed training. Managers will not always have to ask staff to receive training because staff will begin to ask for opportunities to learn (Johnson, 2009).

Acquiring skills through training and development programs increases employees' ability to use the skills both personally and professionally. Effectively communicating to staff the expectations of training and returns on investment is important. Training is also important to the morale of an organization and can contribute to organizational culture and the sustainability of a business (Shahzad et al., 2012). Training should include development opportunities and improve employee retention. The key to promoting a business's worth is employee development (Mayo, 2000).

The workforce is changing because many employees are becoming eligible to retire and aging out of positions. The way human resources practice will contribute to preparing for change and to the types of development that will help high-functioning employees to remain unknown (Kooij et al., 2013). After many years of small staffs, reorganizing, and reengagement, organizational leaders have duplicated the same type of process and caused employee exhaustion (Bartlett & Ghoshal, 2013). Training is essential for organizational growth and development assists employees. One challenge facing many human resources departments is recruiting and hiring advanced leaders that are equipped

Some managers implement practices they learn in training, but the return on investment is often low regarding what managers expect. Researchers have found that training has only a small effect on the sales and revenue of organizations. One finding in a business-training article indicated that many evaluations suffer from small sample sizes, measure impacts only within 1 year of training, and experience problems with survey attrition and measurement that limit the conclusions researchers can draw (McKenzie & Woodruff, 2014).

Professional development is about organizational leaders investing resources in human capital (Pilcher, 2012). Researchers have tried to understand the complexity of leadership (Smith, Montagno, & Kuzmenko, 2004). There is an expectation as a leader to contribute to social change (Burns, 1978). The components of developing talent management include identifying talent, developing talent, and retaining and encouraging talent (Hajimirarab, Nober, & Ghalambor, 2011). Knowledge is one of the most important outcomes of talent management (Schuler, Jackson, & Tarique, 2011).

Human capital development. Human capital development is necessary for organizational development and is related to succession planning (Kariuki & Ochiri, 2017; LeCounte et al., 2017). Human capital is the financial investment in people. There a few categories that relate to human capital development such as the employee's potential, professional development, progression, motivation and commitment (Muda et al., 2016). One of the positive results of human capital development is a return on investment. Human capital development allows employees the opportunity to enhance their skills (LeCounte, Prieto, & Simone, 2017).

Organizational leaders should invest resources in their employees, even if the resources are minimal (Sherman, 2014). Human capital consists of growth and retention. Leaders must develop a process to link training to performance goals for individuals aligned with an organization's goals (Acree-Hamann, 2016). The impact of human capital needs to align within the strategy of an organization. Human capital creates a competitive advantage for organizations.

Researchers believe that human capital are an organization's most prized asset and is worth organizational leaders expect returns on investment but cannot guarantee them (Kariuki & Ochiri, 2017. Investing in human capital is one of the greatest decisions an organization can make (Dillard, 2017). As long as continuous training is involved, enhanced performance and providing the opportunity to transfer knowledge and skills. Human capital is directly related to succession planning, as is, succession planning is an investment that grows the human capital (Kariuki & Ochiri, 2017).

Considerations Unique to the Nonprofit Environment

Nonprofit organizations. NPOs are critical to the workforce in the United States (Salamon, 2012). As the world economy continues to struggle, constant change in the global business community will remain a reality (Chambers, 2013). NPOs are mission driven and have a positive influence on others in the community (Kahnweiler, 2011). The largest source of donations for NPOs is individual giving (Nonprofit Research Collaborative, 2011). Leaders of NPOs depend on grants to fund their programs but can no longer obtain grants and have only mediocre results, as they must show proficiency and efficiency (Kearns et al., 2014).

Professional divides on the board of directors and the executive team can lead to a shift in the mission, and the demise of services related to funding an organization (Kearns, 2013, p. 273). Executive directors and staff members frequently face difficult choices that involve right versus wrong. To maintain ethical integrity, NPO leaders need a system for developing and sustaining ethical behavior and accountability (Hamilton & Slatten, 2013). As an organization's strategy evolves, managers need to create or modify systems and structures to install and reinforce the kind of culture required to implement the type of strategy selected (Gupta, 2011).

Many NPO leaders are hiring applicants with skills related to information systems but with no management or supervisory skills. An entity's primary mission is to demonstrate its effectiveness in attracting resources and transforming them into valued products or services (Keller, 2011). Even as leadership talent becomes scarce, many organizational leaders are maximizing their investments in leadership development (DeRue & Myers, 2014). The most crucial aspect of an organization is future leadership, which affects the success and growth of an organization (Abolaji & Kolade, 2011).

Organizational culture. Organizational culture and leadership affect an organization's results (Hartnell, Kinicki, Lambert, Fugate, & Doyle, 2016). Organizational culture and organizational strategy work together within an organization. Organizational culture and leadership describe the naturally occurring activities, attitudes, and behaviors in an organization (Fullan, 2014). Being able to fit in with the cultural norms and mores adds to the challenges of finding leaders in a succession plan. The development of culture, organization design, and human resource policies is necessary for organizational leaders to create a sustainable competitive advantage (Caillier, 2014). Organizational leaders encourage creativity, an environment of competitiveness and performance, and a climate that supports change (Chiles, 2015).

Organizational culture plays a role in employees learning how to understand and enjoy a work–life balance (Doh and Quigley, 2014). Understanding the origin, changes, and effects of culture is one of the most important aspects of organizational research.

Organizational culture forms the experiences of an organization and affects people's interactions throughout the environment (Sethuraman & Suresh, 2014). The challenge in all organizations is how to introduce the organizational culture to applicants throughout the hiring process, relay information, and train new employees during the orientation period. There is also a period of learning the culture and subcultures of the organization and meeting the people who define the cultures (Miller, 2014).

Organizational change involves planning and development and includes the behaviors and attitudes of the employees (Chiles, 2015). Organizations will experience organizational change as part of their life cycle, often without warning. A majority of NPOs are not ready when abrupt change happens, and such change often causes chaos within organizations. Chaos occurs when the wrong person is in control, does not have a strategy for moving forward, or lacks sustainability efforts. The three most important areas of focus for sustainability efforts are people, profit, and environment (Elkington, 1998).

Transition and Summary

Section 1 included a discussion of several aspects of this study including: (a) foundation of the study, (b) the background of the problem, (c) a general and specific statement of the problem, (d) the purpose statement, (e) the contextual nature of the study, (f) the research question, and (g) the review of the literature. The lack of succession planning in NPOs is an issue because these organizations often do not remain sustainable when the current leadership changes. The literature review included topics on NPOs, characteristics of leadership, strategy for leadership development, organization strategies for succession planning, and considerations unique to the nonprofit environment.

Section 2 includes a detailed discussion of the project. Topics of discussion in Section 2 include purpose statement, role of the researcher, participants, method and design, population and sampling, and ethical research. Other topics are data collection and organization techniques, data analyses, and reliability and validity of the research study.

Section 3 will include an introduction, brief summary of findings, presentation of findings, application of professional practice and implications of social change. I will also present recommendations for further study, reflections learned during the doctoral study journey, and the conclusion of the doctoral study.

Section 2: The Project

Section 2 includes a discussion of the project. The discussion includes the purpose statement, role of the researcher, participants, research method and design, population sampling, and research ethics. The section also includes a discussion of data collection, data organization techniques, data analysis techniques, reliability and validity, followed by the transition and summary. Section 3 includes a brief overview of the study and a presentation of the findings.

Purpose Statement

The purpose of this exploratory single case study was to explore strategies that NPO leaders use to develop future generations and to prepare them for leadership roles within organizations. The target population consisted of leaders in a NPO in Houston, Texas, who have developed strategies for forming future leaders within their organization. The implication for positive social change was the potential for NPO leaders to create strategies that will provide future leaders to maintain their charitable missions. Unlike FPOs, NPOs exist primarily to benefit society in a tangible way. Many NPOs rely on donations, fund-raising, and grants to sustain their organizations. NPOs operate in a competitive marketplace, and their leaders must find ways to stay viable in a market of decreasing resources (Chandler, 2015). Strategies that will help NPOs develop leaders will mean that fewer NPOs will fail, and these organizations will continue to contribute to society.

Role of the Researcher

A researcher is the main instrument for collecting data in a qualitative study and must maintain strict adherence to ethical guidelines (Yilmaz, 2013). In this role, the researcher interviews participants, codes the data, identifies themes and patterns, draws conclusions, identifies any potential source of bias and ensures that the information presented is truthful (Yilmaz, 2013). An important role of the researcher is to uphold ethical standards in regard to human participants to ensure reliability and to protect participants' identity (Yin, 2014). Ethical considerations and methods, presented in the university's guidelines and ethical principles outlined in the *Belmont Report* (Department of Health, 2014) were followed. Ethical standards include (a) respect for persons, (b) beneficence, and (c) justice (Belmont Report, 1974).

As the primary data collection instrument for this qualitative single case study, I collected data via semistructured interviews with NPO leaders and reviewed company documents that included succession planning documents and standard operating procedures. I also identified themes and came to conclusions. I had no preexisting affiliation with the participants.

The use of bracketing separates personal experiences, perceptions, morals, and beliefs from the research data to mitigate bias (Yu et al., 2014). The bracketing methods selected for this study included annotating preconceptions about NPOs, writing memos during the data collection and analysis process, and adhering to journaling procedures. Using a journaling process and keeping a detailed record of data collection, data analysis, and data reporting are a means to eliminate personal bias (Tufford & Newman, 2012).

Researchers use the journaling process to focus on participants' rich description of a phenomenon and to obtain an accurate construct of the participants' perspectives (Tufford & Newman, 2012).

I was flexible in scheduling sessions and professional in obtaining information from participants. The sessions took place during work hours when permitted or after work hours in a private room in a location closest to the workplace. Most interviews lasted longer than 30 minutes. The benefits of an interview protocol include the following: (a) researchers have a guide to achieve a well-planned interview, (b) researchers adhere to ethical guidelines, and (c) researchers collect relevant data (Jacob & Furgerson, 2012).

The interview protocol (see Appendix A) consisted of a list of open-ended questions that provided participants with the opportunity to discuss their thoughts freely. Participants received an email message explaining the purpose of the study, requested participation in the study, requested availability for interview times, and gave my contact information. The interview protocol for this study is in the Appendix A.

Participants

In this exploratory single case study, I interviewed six NPO leaders involved with leadership development and succession planning in their organization. The exploratory single case study and participants met the study's qualifications (Yilmaz, 2013; Yin, 2014). The managers who met the criteria were eligible to participate in the study. First, participants must have possessed knowledge related to preparing future leaders in their NPOs. Second, they must have held a leadership position within an NPO within the past

5 years. Third, the participants must have resided in Houston, Texas. The targeted population consisted of leaders in a NPO in Houston, Texas, who developed strategies for forming future leaders within their organization. I recruited six participants for the study. Data were collected until saturation was met. As is the case in qualitative research (Reybold, Lammert & Stribling, 2013), the choice of participants was purposeful.

After receiving approval from the Institution Review Board (IRB; approval number 02-21-18-0326273), an Introductory Letter to the CEO of the organization was submitted requesting permission to conduct a research study with its employees (see Appendix B). I was responsible for safeguarding participants' confidentiality during and after the study was completed. As Morse & Coulehan (2014) noted, participant confidentiality is important for maintaining trust. To build a rapport with participants, I used words and actions to help make interviewees feel comfortable. I asked them to share their experiences and allowed them to express their opinions for each research question without interruptions.

Hawamdeh and Raigangar (2014) stated that a method to build relationships and trust with participants is to explain the purpose of a study to them. All participants received information on all aspects of the research study, including their value to the study, the interview process, and the need to audio record the interviews. An open and trustworthy environment for participants contributed to the quality of the study.

Signed consent forms remain locked in a file cabinet. As noted on the consent forms, all information provided during the research study remained confidential; results were anonymous with no personally identifiable information relating to individuals or organizations.

Research Method and Design

Researchers categorize research methods in many different ways (Yin, 2014). The three different types of methods are qualitative, quantitative, and mixed method (Venkatesh,Brown, & Bala, 2013). To determine the research method and design, the focus is on the research problem, purpose, and research question (Lim, 2014). The focus of the research method and design in this qualitative single case study was to explore the strategies NPO leaders use to develop human capital and future leaders of organizations in Houston, Texas. The method and design provided awareness for the research question.

Research Method

The research method for this study was qualitative. The focus of a quantitative study is on a postpositive worldview; establishing relationships; and uses numbers to discover the relational, social, and cultural construction of variables (Lim, 2014), which was not the intent for this study. A mixed method design is a more comprehensive method that involves both qualitative and quantitative research (Penman-Aguilar, 2014). I did not choose a mixed methods approach because it involved using a combination of qualitative and quantitative approaches to understand a research problem. Time constraints for the study was a factor in not choosing the mixed method. Researchers of qualitative studies often use interviews, participant observation, audio recordings, historical information, and other approaches (Simon, 2011).

When using the qualitative approach, researchers study individuals, groups, or issues in depth in their natural setting, identify patterns and themes, and subsequently use them as the focal point to analyze contextual data (Barnham, 2012; Yilmaz, 2013). I planned to generate thick, rich descriptions rather than to report statistical data and to explore the strategies NPO leaders use to develop future leaders and to conduct succession planning.

Research Design

The research design selected for this study was an exploratory single case study. A qualitative single case study is most useful when investigating a single phenomenon to carry out a deeper exploration of the information gathered for a better understanding (Kemparaj & Chavan, 2013). Conducting a research study requires careful planning. A case study involves detecting and developing themes to answer a research question using data obtained from participant interviews (Lukka, 2014). The descriptive case study research design should support the goals of the study, the data collection instruments, and the data analysis (Yin, 2014).

A case study design involves an in-depth exploration of issues or problems of a single participant, a time frame, or a group (Yin, 2014). To ensure a smooth transition of leadership to the next generation of leaders, researchers should focus on leadership development (Simoneaux & Stroud, 2014). One of the main characteristics of a case study design is collecting data and information from within a natural environment and free from external limitations (Kemparaj & Chavan, 2013).

Phenomenology, ethnography, and grounded theory were not suitable for this study. The phenomenological design is a means to understand the lived experiences of study participants to establish meaning (Chen & Deterding, 2013). The focus of this study was the reality of succession planning in NPOs rather than perceptions of these programs. The focus of an ethnographic study is culture, people, and the exploration of a phenomenon within the community (Pietkiewicz & Smith, 2014). Grounded theory is a systematic approach designed for developing theories and empirical evidence to reinforce theories (Bateman, 2013); however, it was not my intentto explore strategies NPO organizational leaders use to develop human capital and future leaders.

When selecting a study design, achieving data saturation was part of the process. Data saturation refers to the process of collecting significant data from interviews, analyzing if there are sufficient data received and determining whether the study sample demonstrates validity (O'Reilly & Parker 2012). During this process, one cannot assume that either a large sample size or a small sample size will guarantee that data saturation will occur (Burmeister & Aitken, 2012). One way to reach data saturation is by asking probing questions (Bernard, 2012). To reach data saturation, I was not looking solely at the quantity of interviews but more on the quality of data received during the interviews. I interviewed six participants. I made certain to interview enough participants to reach data saturation.

Population and Sampling

The population for this exploratory single case study was 14 NPO leaders in Harris County in Houston, Texas who have developed strategies to form future leaders in their organization. Purposive sampling was the process for selecting participants who have experienced the phenomenon and who could provide answers to the research questions (Poulis, Poulis, & Plakoyiannaki, 2013). Researchers should select participants for a study based on their position and experience with the organization and topic (Cleary, Horsfall, & Hayter, 2014). Participants should have experiences, knowledge, and expertise to provide an understanding of succession planning and to answer the research questions (Humphrey, 2013). All upper-level managers, including CEOs and CFOs, were part of the sample. I used face-to-face interviews to gather data from a minimum of six participants. A review of the company's succession planning strategies completed the data collection.

I selected the participants based on purposive sampling. The purposive sampling method was a nonprobability method of sampling; the researcher purposefully selects participants who suit the purpose of the study (Wilson, 2014). The recommended sample size for a case study was between two and six participants (Yin, 2012). The selection of the participants in an exploratory single case study was an essential element to the study's validity (Robinson, 2014). The participants met the sampling criteria. It was also important that participants were comfortable in the environment and during the interview process. Sampling size differs depending on the research questions and design of the study (Walker & Forbes, 2014).

In qualitative research, data saturation is a fundamental element in the selection of participants (Cleary et al., 2014). Saturation is the point in the interview process where the researcher ceases to identify new concepts (O'Reilly & Parker, 2013; Yu, Abdullah,

& Saat, 2014). A two-step process is an accepted method to obtain data saturation (Francis et al, 2010). To apply this method, the researcher selects a minimum sample size (based on the methodological literature) for initial analysis. For a case study, this is usually between four and six interviews (Yin, 2014). I selected a minimum of six participants. If data saturation is reached, then the second step involved two more interviews. If no new ideas emerged, then I stopped interviewing at that point. If need be, the second step was repeated until data saturation is met. To further ensure data saturation, I used a technique discussed by Morse (1995). At the end of each interview, I asked participants the following: Do I need to know anything other than what I have asked to understand your succession planning?' This was an additional method to ensure that saturation was achieved and to ensure that nothing else was needed to be added to the topic of interest.

Ethical Research

Research ethics is essential for protecting participants' rights, safety, dignity, and well-being (U.S. Department of Health and Human Services, 1979). In conducting ethical research, participant selection needs to be fair, participants must consent to participate in a study, and researchers must protect participants' privacy and confidentiality (Yin, 2014). Ethical consideration is critical to any research project and happens in all research locations (Merriam, 2002). This researcher will treat all those involved with respect in accordance with Walden University's IRB and American Psychological Association guidelines (see Appendix B). There were no recognizable risks for participating in this study. The supervisors participated in interviews and discussed their experiences as supervisors.

Informed consent was part of the research process that informed potential participants in a study about: a) the procedures used in the study, b) their rights as participants, and c) the benefits and possibilities of their participation in the study (Nuez & Nuez, 2007). Managers or employees might feel uncomfortable discussing the study with the participants (Walden IRB, 2014). Participants signed an informed consent form before participating in the study and were informed of their right to withdraw at any time without any repercussions.

Based on information contained in the informed consent form, participants were aware of the risks involved in taking part in the study and the actions selected to mitigate the risks. Participants received the researcher's contact information in the event they would like to withdraw from the study or requested to see its results. Any participant wanting to withdraw from the study before or after the interview has occurred, needed to contact the interviewer by phone or email using the information included on the Informed Consent document.

Participants received no incentives for participating in the study. There were no repercussions if any participant decided to withdraw from the study. At the conclusion of the study, all participants received a thank you note and an offer to receive a summary of the study's findings.

In accordance with the ethical procedures of the Belmont Report, researchers must protect the privacy and confidentiality of participants (U. S. Department of Health and Human Services, 2015). Data was stored on a password-protected computer hard drive in a home library and will be shredded five years after the study's completion. Each participant was referenced with a coded pseudonym such as TEAM MEMBER 1 (TM1), TM2, and so forth.

To ensure privacy and to protect the confidentiality of participants, I followed the guidelines of the Belmont Report on ethical protocols. To ensure confidentiality, each participant was recorded under a pseudonym. All necessary steps were taken to ensure the safety and comfort of all participants, and no identifiers such as participants' names, emails, addresses, phone numbers, positions, or places of employment were released. All electronic data was kept secure and password-protected. Participants were advised that the data collected will remain secure on a flash drive in the researcher's home for five years, after which time the flash drive will be destroyed. The USB flash drive used for securing information was password protected and placed in a locked storage cabinet with limited access in the researcher's home.

In accordance with university guidelines, approval was received from the Institutional Review Board (IRB) before commencing with data collection. IRB approval contained an expiration date, and researcher is aware that the research cannot extend beyond the approval date. It was not necessary for work to extend beyond this date; therefore, a continuation request was not submitted.

Data Collection

Instruments

In qualitative research, the inquirer is the main instrument in the data collecting process (Wagstaff & Williams, 2014). This researcher was the primary data collection instrument. Semi-structured interviews and archival data was the data collection strategies for this exploratory single case study. The semi-structured interview is appropriate as the primary data for a qualitative case study (Yin, 2012).

For this study, data collection methods included interviews and review of company leadership training plans and succession planning documents. Interviews were the primary source of data. A personal interview is the most efficient way of obtaining the necessary data for most qualitative studies (Simon & Goes, 2013). A case study is efficient when researchers try to determine why, how, what, and when certain events transpired (Yin, 2013). A semi-structured interview provided an opportunity to probe participants' experiences for a more in-depth understanding. The interview protocol assisted with consistency throughout the study (See Appendix A).

Participants received interview questions via the consent form (see Appendix B). In qualitative research, interviewing is critical to the data collection process and requires active listening and comprehension (Rowley, 2012). Semi- structured interviews allow the researcher to explore further questions on subjects introduced by the interviewee (Cachia & Millward, 2011). Procedures for qualitative data collection included observations, interviews, and documents. Business documentation such as succession planning, strategic plans and other documents evaluating and explicating the organization's succession plan also were reviewed.

Company documents analyzed included a buildup of documents from the previous five years that explained the current and past promotions and developing an organizational chart. Additional documents may include the following: a) training paperwork, b) mentoring relationships, and c) succession planning. In a case study, all evidence is of value to the study (Sinkovics, Penz, & Ghauri, 2008).

Semi-structured interviews and archival data were used for this exploratory single case study. Participants answered open-ended questions relating to the level of succession planning utilized at the interviewee's location. If a succession plan existed, documents verifying the plan and strategy were requested. It is understood that reviewed documents will not always reflect the reality of what is occurring in the workplace; however, reviewing the documents is a form of triangulating data.

To make certain the data collected for this study is thorough, reliability and validity has to be established. Reliability relates to the consistency and repeatability of the data source (Simon & Goes, 2013). To ensure repeatability, a copy of the interview questions was completed and submitted to all participants before the interview session (see Appendix C). Reliability reduces the chances of bias within the study. The researcher's responsibility to the study is to select the most reliable instrument.

To ensure validity of the qualitative study, the following must be assured: a) the research question is valid for the projected outcome; b) the design is valid for the methodology, and c) the chosen methodology relates to the research question (Leung, 2015). Member checking was a part of the study. This will ensure the study's credibility, findings, and interviewees' conclusions (Hadi & Closs, 2016). Member checking includes verifying spoken words with written transcripts of dialogue for accuracy (Bygstad &Munkvold, 2007). It also includes the sequencing, consistency, and frequency of those checks (periodic: before, during, and after) to bolster the study's trustworthiness. Member checking involves the process of checking with research participants to determine whether the identified concepts and codes fit one's personal experience (Carlson, 2010).

Data Collection Technique

Data collection is an integral part of the research process for gathering information to answer research questions (Pederson, Hack, McClemont, & Taylor-Brown, 2013). Researchers use multiple sources of data for qualitative case studies (Yin, 2012). The lists of NPOs that were used for this study were obtained from United Way Greater Houston. After receiving approval from the Walden University IRB, the process of enrolling participants began. Interviews were conducted at a location and time convenient to participants. Telephone interviews are an option to consider for qualitative studies and participant convenience (Lechuga, 2012). When necessary, interviews were conducted via telephone conference.

I conducted semi-structured interviews and asked open-ended questions by following an interview protocol (see Appendix A). Analysis will continue throughout the process. The data collection technique chosen for this study was face-to-face interviews or telephone interviews, depending on the accessibility of the participants. For consistency, the study involved asking every participant the same questions. Interviews are one of the paramount sources of information for a case study and may be the most important source available (Yin, 2003).

Steps involved in data collection techniques included making initial contact with participants by telephone and email, scheduling and conducting the interview, and recording and taking detailed notes of the interview process. These steps are in accordance with suggestions made by Miller and Dorman (2014). Interviews took place at a location identified by the participant after participant signed the consent form.

Interviews lasted between 30 and 45 minutes and took place in a private conference room at participants' places of business. Note taking is an effective way to describe nonverbal communication and to collect information on behavioral observations and impressions (Miller & Dorman, 2014). I used NVivo 8 software to manage and analyze the data. An Olympus WS-823 voice recorder with 8 GB built-in memory was used for recording interviews. All signed consent forms and data will remain in a locked safe for a minimum of 5 years. This process is in accordance with recommendations made by Junehag, Asplund, and Svedlund (2014).

The objective of the data collection process was to obtain perceptions and ideas about lived experiences. By answering open-ended interview questions, participants could elaborate on situations unique to them (Gysels, Shipman, & Higginson, 2008). Research interviews are a traditional method of data collection that highlights the assessment of lived experiences (Halcomb & Andrew, 2005). The interviews may diverge from the intent of the study (Yin, 2014). Should this happen, the researcher will gently guide the conversation back to the study's focus. During interviews, clarification of comments and statements may be needed for a better understanding. Depending on where the participant is taking the call, background noise and weather may present an issue during a telephone interview. Archival documents may present deficiencies.

Participants received a copy of their interview transcript to review and confirmed the data's accuracy. Member checking ensured the study's trustworthiness. The member checking process was a means to determine whether the findings were reasonable and whether the themes uncovered appeared accurate and credible as recommended by Jeffers (2014). The participants had an opportunity to provide feedback on the data analysis and the transcription. This opportunity is in accord with a recommendation made by Koelsch (2013).

The process for enhancing the reliability and validity of an instrument involves designing a tool to ensure dependability and credibility (Morse, 2015). The composition of the interview protocol design for collecting data to answer research questions is a vital aspect of reliability (Bjerregaard, 2011). The questions in the instruments (see Appendix C) were designed so participants could provide their perceptions and ideas of their experiences with leadership development and succession planning. Participants need to be able to ask questions about interviews and to provide feedback (Unluer, 2012). Data saturation is a process of achieving credibility (Francis et al., 2010). The in-depth data analysis and repeated review of the transcripts to reach saturation was a process to ensure accurate descriptions or interpretations of the data.

Data Organization Techniques

The process for data organization involved obtaining digital voice recordings of participants' responses to interview questions, downloading audio interviews into a password-protected computer, and transcribing interview responses verbatim into Microsoft Word (Bevan, 2014). Organizing and managing the process of data organization can be overwhelming (Watkins, 2012). To maintain a proper log for all participant interviews, each audio file included a letter and a number. NVivo software was suitable for organizing and analyzing the data (Bazeley & Jackson, 2013).

A secure computer thumb drive served to preserve electronic records. The data received from the interview must be transcribed, coded, and organized to help researchers understand consistent themes (Bazeley & Jackson, 2013). Accordingly, downloading the raw data after the interview helps with organization. The NVivo software provides many different options for playback, including audio, video and use with social media (Leech & Onwuegbuzie, 2011). Electronic data such as audio files and interview transcripts were accessible only by password. Participants were advised that the collected data will remain in the researcher's home office on a secure external drive for five years, after which time the external drive will be destroyed and discarded.

Data Analysis Technique

Data analysis is a systematic review of data elements involving data interpretation to discover underlying meaning (Klassen et al., 2012). During this process, data coding will include using a coding process to capture topics, experiences, and other key information obtained during interviews. Qualitative data analysis software to analyze the data in this study was used. Semi-structured interviews included predetermined questions for probing. The participants' responses to the interview questions were the primary source for data analysis (See Appendix B).

Semi-structured interviews were the primary data source in this exploratory single case study. Interview questions were examined based on responses given by the participants. Researchers use methodological data triangulation to establish the quality and rigor of a study with the application of multiple data sources (Yin, 2014). Triangulation was suitable for data analysis for this exploratory single case study. In addition to interview data, I analyzed succession plans and leadership program documents. A five-stage data analysis process suggested by Yin (2014) was used as follows: a) collect the data; b) separate the data into groupings; c) group the data into themes; d) assess the material, and e) develop the conclusion.

After the interviews were completed, all information was analyzed to see how it applied to the study. All documents suggesting succession planning were analyzed for their value to the study. The process consisted of associating key themes identified in the literature review as the foundation for sorting all data collected during the study (Johnson and Campbell-Stephen, 2013). An overall data analysis on information collected from interviews was performed. The process of categorizing and compiling data into subgroups helps make the findings transferable to other settings (Yin, 2011b).

During the process of disassembling, codes were assigned based on the component described in the literature review and placed in the appendix (Yin, 2011). After completing the review of archival data and interviews, the analysis of data began.

The manual coding process started by reviewing the raw data and bracketing experiences to eliminate biases (Yilmaz, 2013). Coding procedures will include highlighting significant statements on the raw transcript and color coding statements to organize statements into themes (Yin, 2013).

The next phase was to reassemble all that was disassembled in the last phase. A codebook, NVivo software, and a research log were used to organize and track the evidence to support the analysis of data. An Excel spreadsheet was used to maintain and label emerging themes and patterns for analysis. During this process, data was evaluated continuously to alleviate specific bias and patterns.

During this phase of the data analysis, an explanation of the facts was identified based on the evidence found. NVivo software is a tool to organize, store, code, and manage collected data to improve research dependability (Pfaff, Baxter, Jack, & Ploeg, 2014). The software facilitates the process of analyzing raw data gathered from the interviews to identify clusters or themes based on participants' experiences (Yilmaz, 2013). The researcher will need to highpoint and be able to explain specific issues during this phase of the analysis (Carcary, 2011).

The results of this study have a central focus on the conceptual framework relating to strategies that NPO leaders use to develop future generations and to prepare them to assume leadership roles within the organization. The open-ended questions were geared towards the participants' answering the questions and supplying additional information. Information on leadership characteristics and leaders' skill sets is among the data expecting to be collected.

Qualitative research brings about a substantial amount of data that researchers must organize as follows: a) collect the data; b) separate the data into groupings; c) group the data into themes; d) assess the material, and e) develop the conclusion (Yin, 2011). The process to establish meaning from interview data involves coding participants' statements into clusters of invariant constituents, single concepts, or ideas to develop theme clusters (Stone, 2013).

All responses were treated with confidentiality and only the researcher will perform the analysis and interpret the data. The name of participants and organizations will not be mentioned or appear in the study. All key themes were compared and contrasted with existing literature, and the findings were discussed in terms of the question that guided the study and the conceptual framework that provided the foundation for it as recommended by Johnson and Campbell-Stephens (2013). Key themes developed during the interview process. Conclusions were drawn based upon the emphasis participants place on specific events during the interview. This study will use the coding and themes method (Miles, Huberman, & Saldana, 2013).

All responses were treated with confidentiality, and only the researcher performed the analysis and interpreted the data. The name of participants and organizations were not mentioned and did not appear in the study. All key themes were compared and contrasted with existing literature, and the findings were discussed in terms of the question that guided the study and the conceptual framework that provided the foundation for it as recommended by Johnson and Campbell-Stephens (2013). Key themes were developed during the interview process. Conclusions were drawn based upon the emphasis participants placed on specific events during the interview. This study used the coding and themes method (Miles, Huberman, & Saldana, 2013).

Reliability and Validity

Reliability

Maintaining all notes or observation and information submitted throughout the data collection process will allow researchers to use the data for future studies (Ali & Yusof, 2012). Qualitative researchers achieve reliability by assuring credibility, transferability, dependability, and confirmability (Yin, 2014). The likelihood of researchers to draw the same conclusion from a study is increased when the same data and settings are used (Merey, 2012).

The credibility of qualitative research depends on the depth to which the results are believable and trustworthy (Yin, 2014). Researchers must have a variety of strategies to ensure data credibility ((Pfaff, Baxter, Jack, & Ploeg, 2014); Moon et al, 2013). In this study, credibility will occur through member checking, triangulation and the use of reflective journaling.

In a qualitative study, dependability is an external validation that helps ensure the findings of the study by other researchers that follow the same steps (Moon et al, 2013). To establish dependability, an audit trail was used. This involves an examination of the process and product to validate the data collected (Bowen, 2009). Independent investigators can use the audit trail to retrace the procedures quickly in the event of research replication. NVivo software is a tool to organize, store, code, and manage collected data and improves research dependability (Pfaff, Baxter, Jack, & Ploeg, 2014). NVivo helped manage and analyze the data collected in this study.

Strategies to mitigate threats to dependability include providing a rich description of the methods of data gathering, analysis, and interpretation, thereby enhancing replication (Cope, 2014). Participants received a copy of the transcribed notes, and detailed interview notes were reviewed, thereby increasing the chances of reliability. I used member checking to make certain the transcripts were accurate and that the emerging themes were consistent with the participant's intended description of the experience as recommended by Harvey (2014).

Transferability or portability of qualitative research refers to the extent to which the findings apply to other contexts or settings to establish validity (Yin, 2012; Yilmaz, 2013; Morse, 2015).) Transferability was enhanced by acknowledging the assumptions central to the study. The person who wishes to 'transfer' the results to a different context is responsible for making the judgment of how applicable the transfer is.

Validity

In qualitative studies, validity is the degree to which a study supports anticipated assumptions drawn from the outcomes of a researcher (Yin, 2012). In qualitative research, the goal is to obtain creditability, confirmability, and transferability (Powell, Hughes-Scholes, & Sharman, 2012; Morse, 2015). I documented all data collection techniques used throughout this study.

In qualitative studies, credibility refers to internal validity and transferability to external validity, and both are critical factors of research quality (Morse, 2015).

Interviewers ensure credibility by recording interviews, creating word-for-word transcriptions, and allowing participants to review transcripts for accuracy (Patton, 2002). Multiple data sources, triangulation of data, and member checking are elements of credibility in case study research design (Thomas & Magilvy, 2011). Triangulating data from multiple sources is a means to validate findings in qualitative studies (Yin, 2012). In this study, in addition to interviews, I analyzed leadership development programs and succession planning documents.

Member checking ensures credibility in the data analysis and coding process (Marshall & Rossman, 2011). Member checking includes involving participants in transcript review and verifying emerging themes and inferences by asking participants to offer reasons denoted in patterns (Bygstad & Munkvold, 2007). Member checking improves validation because it decreases the chance of misinterpreting data (Carlson, 2010). Using the member checking method will help establish credibility and decrease internal threats to the study.

Accuracy of research findings is an element of confirmability; the findings are the meaning of the participants' experiences (Marshall & Rossman, 2011; Yin, 2012). Objectivity in data accuracy is a necessity for confirmability (Elo, et al., 2014; Kemparaj & Chavan, 2013). Confirmability means that the research findings are consistent with standards and can be confirmed or corroborated by others (Houghton et al, 2013). . Maintaining an audit strategy and providing information regarding the data collection process allows for possible further research as recommended by Ali and Yusof (2012). Confirmability is best achieved by an audit trail, and physical evidence that the research did occur was provided so that the inquiry was verifiable. I achieved confirmability through member checking and keeping an audit trail of the research findings.

Based on the rich details of data analysis, the findings are transferable across other populations or settings (Zarshenas et al., 2014). To achieve transferability, sufficient detail regarding selection of the research problem, research method and design, purposive sampling, and data collection and analysis were provided. . This enables the reader to decide whether the prevailing environment is similar to another situation with which he or she is familiar and whether the findings can justifiably be applied to the other (Whittemore, Chase, & Mandle, 2001). By describing the research framework and assumptions focused on the research, the transferability will increase. The study's boundaries were clarified, such as the number of participants and organizations involved, the data technique utilized, and the period to accumulate the data. To ensure transferability of qualitative inquiry, my role was to provide a thick description of the research process, data collection, and the final report, which may enable other researchers to replicate the study.

To help increase transferability, data saturation was used. Data saturation is significant when selecting participants for the study (Sinnott, Guinane, Whelton, & Byrne, 2013). The two- step process to determine if data saturation has occurred was used. To start the process, the researcher will select a small sample size from the literature. I started with a sample size of six. If data saturation is determined, then step two will involve two more interviews. Step two was repeated until data saturation was met. The interviews ceased when no new themes were identified.

Transition and Summary

Section 2 is a discussion of the study project. The purpose of this exploratory single case study was to explore strategies that some NPO leaders use to develop future generation and to prepare them to assume leadership roles within the organization. The role of the researcher is to function as the primary instrument for the data collection process and to maintain strict adherence to ethical guidelines. NPO leaders were interviewed, succession planning strategies explored, data was coded, and a search for themes, patterns and conclusions was drawn from the analyses. Section 3 will include the study's findings. Included in this section were applications to professional practice, implications for social change, recommendations for action and for further study. The section will include a discussion of personal reflections, a summary, and research conclusions.

Section 3: Application to Professional Practice and Implications for Change

Introduction

The purpose of this exploratory single case study was to explore strategies NPO leaders use to develop future generations for leadership roles within the organization. To understand the significance of succession planning and executive leadership for nonprofits, I used seven open-ended semistructured interview questions with the executive team and managers of an NPO in Houston, Texas. The population consisted of NPO leaders in Houston, Texas. Participation was voluntary, and I informed each participant of their right to withdraw from the study at any time without repercussions. I also reviewed and analyzed the organization manuals, including the employee standard operating procedures (SOP), organizational chart, employee handbook, and a management-in-training course. The management-in-training course is considered the top of the line training course for high-level executives and entry-level executives. The certificate allows the recipient means to interview for open executive positions, training at the summer and fall conferences, and Advanced Executive Management Training.

I researched effective strategies by interviewing four executive members and two managers in the greater Houston, Texas area. Each participant expressed interest in the subject of succession planning, and most had knowledge and experience in leadership development. The next section contains the findings related to each theme and includes data summaries. Interviews took place at settings where the participants felt comfortable and could provide detailed responses to the questions without any distractions. Revealing the names of the participants and the interview location would be a breach of confidentiality of the participants and integrity of the study.

The findings revealed that the organization did not have a succession planning procedure in place. While reviewing data, during the data analysis process, four themes emerged: (a) the need for a formal succession plan, (b) barriers to succession planning, (c) investment in human capital, and (d) necessary practices and processes for succession planning. I include additional explanation of the emerging themes in the presentation of findings.

Presentation of the Findings

The overarching research question was used to guide this qualitative single case study: What strategies do NPO leaders use to develop future generation and prepare them to assume leadership roles within the organization? The findings from the analysis revealed that the organization did not have a formal succession plan. However, all participants agreed that within the organization there is an informal procedure in place to recruit midlevel and lower-level management. The study participants revealed their own ambitions of advancement and desire to be a part of a formal succession plan. Organizations may find themselves more equipped to develop future leaders when, and if, there is a formal mentoring program in place (Corner, 2014).

I analyzed data by collecting archival data, preparing seven semistructured open-ended interview questions (see Appendix A), and conducting interviews with participants, allowing them the opportunity to share strategies they used, or plan to use, for future leadership development and succession planning. Before the interviews started, each participant reviewed, signed, and received a copy of the consent form. I conducted semistructured interviews with four NPO executives and two managers and used methodological triangulation of all my data sources. The intent was to discuss the organization's succession planning and leadership development opportunities. The interviews lasted between 25 and 45 minutes, and all interviews took place in an isolated office at the company location in Houston, Texas. After the completion of the interviews and transcription, the interviewees were able to confirm the accuracy of the transcripts and confirm that the developing themes were in accord with their experiences.

NVivo 11 software served as the tool to organize and manage the data for analysis and, in conjunction with systems theory and a review of the related literature, four main themes emerged that related to the strategies used for succession planning. The NVivo 11 software was helpful with coding and assisted in identifying recurring themes from the interview records. Pseudonyms were used to ensure confidentiality and to protect participants' identity, and the interviewees were identified by code names as Staff Member 1 SM1, SM2, SM3, SM4, SM5 and SM6 and the organization as DS (Diverse Solutions).

Due to confidentiality, participants did not want to discuss certain aspects of the organization and its staff. Particularly, there were concerns of executive leadership finding out who made certain comments during the interviews and also the sharing of certain information. Safeguarding participants' responses during and after an interview encourages confidentiality (Petrova, Dewing, & Camilleri, 2016). This is very important for the protection of all parties involved in the study.

Table 1 depicts demographic information of each participant. All interviews were digitally recorded and transcribed and resulted in 76 pages of written, meaningful information for use in the study. The average number of years of experience for the executive leadership participants who completed the interviews was 14.4. Even though a great deal of data were collected during the interviews from participants, for purposes of this study, age and gender were not disclosed due to confidentiality. As stated throughout this process, the protection of the identity of all participants is very important; therefore, no other personal information was collected or recorded that could identify participants. The only information regarding participants was information collected during the interviews.

Table 1

Demographic Data for Study Participants

Participant	Position or title	Years of business experience
SM1	Vice president of business development	15
SM2	Vice president of human resources	6
SM3	Chief financial officer	8
SM4	Chief executive officer	20
SM5	Director of human resources	8
SM6	Director of training & development	7

As noted in Table 1, participants represented different leadership positions within the same organization.

Table 2 represents participant interview data. I listened to each digital recording and compared it to the transcripts and notes taken during the interview. Each transcript was reviewed three times. Notes were written to make sure nothing was missed during review of the data.

Table 2

Participant Interview Data

Participant	Date	Time recorded	Pages	Word count
SM1	3/21/18	38:12	17	8,475
SM2	3/29/18	27:09	9	4,456
SM3	4/3/18	29:43	10	4,965
SM4	4/13/18	42:15	20	10,050
SM5	4/25/18	34:12	15	7,475
SM6	4/30/18	24:05	7	3,483

Note. Times for recording varied for each participant due to their rich description and or those that provided less information.

During the interviews, information and documents were shared. These reviews provided insight into the organization's directions with mission, policy and procedures, and investment in human capital. The organization's emphasis was on the need for formal succession planning and leadership development. The organization's website provided background information related to the history and mission statement. The mission of the organization is creating value for staff members and service to the customer. DWS's impact is derived from the support of the community, fundraising, donors, the generosity of the business partners, and the dedication of the staff members.

During the interviews, two of the six participants submitted documents, and three of the six participants were interested in discussing their idea on succession planning and the future of the organization. Due to confidentiality concerns, one participant did not share much information pertaining to the problems the organization faced due to not having a formal succession plan in place. Developing employee skills is a prerequisite for succession planning and leadership development. As an organization cultivates, there is a need to be more knowledgeable, and leaders should welcome the opportunity to develop its human capital (Gandhi & Kumar, 2014).

SM1 presented the Standard Operating Procedures during the interview that we both reviewed and discussed. The Standard Operating Procedures are processes outlined for all employees to follow. SM1 pointed out that not all employees are able to review the SOP, and many do not know that the SOP exists. Not knowing that the SOP exists can be attributed to a lack of communication by management and the absence of copies at all locations. What tends to happen is that management has attempted to hold employees accountable with the progressive disciplinary process based on processes included; however, without any knowledge of access, employees are unable to challenge perceived injustices. According to SM1, there is not a formal succession plan in place; however, this is something to be added within the next few months. SM1 hopes that when the plan is enacted, it will be shared with all employees, along with the SOPs.

SM2 explained that the employee handbook and organizational chart includes a promotion procedure. SM2 explained that vacant positions are not posted at each location or communicated throughout the company, which prevents promotable opportunities within the company. SM2 spoke very highly of the organization chart and how in the previous 6 months, more positions have been created. With the creation of more positions, the organizational chart expands the opportunity for more growth and leadership positions.

SM3 did not present any documents during the interview. According to SM3, things are going well, and there should be continued progress in the right direction. SM4 did not present any documents during the interview but spoke about some key components of the development of the successor. Even though this is not a family business, he thinks it would be good for someone who has devoted their time and has a vast understanding of the mission and goals of the organization.

SM5 hesitated to present the succession chart due to lack of being able to explain the inconsistencies that have transpired over the past few years. The succession chart was shown, but I was not allowed to take a copy with me. A review of the chart confirmed that there was a noticeable difference in the executive team statement of a proposed succession plan in place compared to what was shown on paper. For example, previous leadership positions such as vice president of operations, director of training & development, and vice president of development remained vacant for over 2 years and could have been filled internally.

SM5 explained that the organization was creating positions in a few departments; this was good for the business and advancement opportunities. However, there were a few positions that needed to be filled from within, but there seemed be no sense of urgency. TM5 spoke about the need for a director of HR position, but felt the process of promoting from within was not an option. She decided not to go any further with that statement.

SM6 was accepted into the 18-month Development Program (DP) and expects to complete the program in December 2019. SM6 was very excited about the program and explained that no one else in the organization, in this city was selected for the program in the previous three years. The DP was operational throughout all cities and countries where the organization resided, and employees were selected by the executive team. Based on reviewing some information I was shown during the interview, there were approximately 15-20 others currently in the program, residing from different states.

The foundation of the Development Program was based on the current demands of the environment including shifts in demographics, economy and technology, it is more important for all leaders across the Diverse World Solutions (DWS) enterprise be familiar with how to read and analyze financials. This program provides an opportunity for DP alumni, SLP alumni, New CEO's and other leaders to work in a collaborative and engaging setting to learn the nuts and bolts of DWS financials and beyond. The program also covers strategies on leadership, mission strategy, risk management, loss prevention and financial turnaround (critical performance factors, board relations, insurance issues) and real estate financing.

To promote confidentiality, documents with names and information relating to salary, notes on advancement, and performance evaluations were not disclosed. Documents containing cultural attributes, governance configuration and organizational strategic plans were reviewed upon consent of DWS executive leadership to recognize the patterns of succession planning and leadership development. Relevant documents are necessary in Case Study inquiry (Yin, 2014). The review of documents allowed insight into the lack of internal promotions vs external hiring and how the failure of succession planning by the executive leadership team and board of directors. All participants discussed that there was not a formal succession plan in place, but the leadership team is working on to formalize a plan.

Table 4

Top Seven Frequently Occurring Words Related to Content and Context

No.	Groups and keywords	Theme	*n*
1	Informal	4	21
2	Human capital	3	29
3	Promotion	3	12
4	Organizational strategy	2	18
5	Procedures	4	31
6	Succession planning	1	41
7	Leadership development	3	34

I conducted an analysis that included the top seven frequently occurring words related to the themes word count. Participants keywords were taken from the interviews and most of them were key in identifying the themes. The keywords located in Table 4 are words related to the themes. The ranking order of the keywords are not relevant.

Interview Questions

The seven semi-structured questions provided the ground work for obtaining the data needed to answer the research questions and develop themes. These questions centered around the specific ways that NPO's and their leaders prepare themselves for sustainability. The questions for the interview were:

Interview Question 1: What was included in your strategic plan for succession planning? The purpose of this question was to create dialogue regarding if DWS had a true formal succession plan in place and if the participants were familiar with the strategic plan process.

Interview Question 2: How have you, as a business leader of an NPO, participated in developing the future generation of leaders in your organization? The purpose of this question was to initiate a dialogue during the open-ended semi structured questions regarding the idea of training future leaders within their organization.

Interview Question 3: What processes has your organization used to find leaders? The purpose of this question was to invoke discussion about the amount of participation

Interview Question 4: What were some of the effective processes used in your organization for leadership development? The purpose of this question was to allow participants to express the need for personal and professional development within the organization. Participants could provide examples of specific professional and personal development opportunities that the organization is using since they do not have a distinguishable succession plan in place.

Interview Question 5: What factors were considered in the succession plans in your organization? The purpose of this question allows participants the opportunity to express what factors played a role in the succession plan or what was missing in the decision of succession planning.

Interview Question 6: Please elaborate on strategies your organization might enact to prepare future generations in assuming leadership roles within your organization? The purpose of this question was to allow participants to describe what their opinion of what strategies the organizations uses in staffing leadership positions within the organization. Organizations that include employees in the development and implementation of new change such as strategic plans have less issues with employees understanding the focus and purpose.

Interview Question 7: What other information, if any, would you like to share concerning how you find and develop leadership within your organization? The purpose of this question was to invoke discussion about how the organization seeks out and develops their internal human capital.

Theme 1: The Need to Adhere to a Formal Succession Plan

The first theme that developed was the need to adhere to a formal succession plan. A formal, documented succession plan for the organization DWS does not exist. While a formal succession plan is not in place, the organizations had different activities and ongoing processes in place to plan for the successor in director positions, but not at the CEO level. The organization has recognized the need for a formal planning for succession for all executive and leadership positions, including: Chief Financial Officer, Chief Operating Office, Vice-President of Operations, Vice-President of Human Resources, Vice-President of Business Development, Director of Risk Management, Director of Human Resources, Director of Operations, Director of Development, and Director of Community Development and other positions underneath those positions. All organizations, no matter how small or large, how profitable, need succession planning to survive (Harrell, 2016).

All participants supported the idea of creating and supporting a leadership channel for potential leaders. Three of the participants described the organizations current leadership pipeline as weak. While the other three described what is considered a networking list among other franchised executives. Participants SM1, SM2 and SM5 stated that the organization lacked depth, growth, development, structure and investment in human capital. Participants SM3, SM4 and SM6 agreed that the five-year strategic plan shapes what the organizations succession plan for future should look like. All participants agreed that the Board of Directors involvement includes more of a 'governing body' than the 'managing of organization'. Participants stated that succession planning discussions with the Board of Directors has not happened within the last 18 months due to unforeseen issues with previous leaders.

There is a need for organizational structure, leadership development and for the executive leadership team to strategically plan for the long-term. Succession Planning is a subgroup of effective leadership development. The study revealed that the organization was engaged in many different activities that included programs geared towards leadership development, which caused many team members to relate those activities to succession growth. Many organizations pride themselves activities that have to do with development but are not that of succession planning (McKee & Froelich, 2016).

Throughout the interviews, the words of informal, human capital, leadership development, promotion, organization strategy, succession planning and procedures continued to repeat. The new VP of Business Development has started to focus on mid-management and senior management succession planning. Creating a mentorship amongst current leaders and those who were sought out is essential to the development of the future leader (Muir, 2014).

All participants discussed the importance of the organization being transparent with team members about the strategic plan and how does the plan align with succession planning. This is in accord with effective business strategies (Malkie, 2014). Time spent during the interview and observation of a growth and development meeting, were important because it allowed the opportunity for participants to discuss succession planning, leadership development opportunities, talent management, and organizational structure.

Participants SM1 and SM2 discussed their experiences with the hiring process in filling vacant executive positions. Participant SM1 explained how she asked the interviewer about succession planning during the interview and was told that no formal succession planning existed, but the individual was not ready to hold this position and there was no one else available to fill either of the vacant positions SM1 expressed concern that an organization of this magnitude lacked a leadership development program, a vetting process and ways to seek out talent within the organization.

Theme 2: Removing Barriers to Maintain a Succession Plan

Barriers to maintain a succession plan includes not getting a program started or starting a program that is not aligned with the strategic plan (Goldman, Scott, & Follman, 2015). Most of the data from this theme was evident from the lack of documents regarding leadership development and succession planning. Each participant understood that when the organization introduces new changes, that the change must happen, regardless of the inherent value of the change. Leadership should understand that change initiatives affect employees and employees' effect how the change will take place. Barriers to succession planning are common for many organizations. The issues range from the lack of understanding on implementation, the lack of building human capital, leaders not willing to step down and turn over the position and organization to someone else.

Interviews. Participants SM1 and SM2 discussed their experience with the hiring process and how they filled vacant executive positions when they were hired. Both participants have a background in succession planning and understand the need to tap into employees' skills within the organization. The key ingredient to succession planning did not start with the leadership nor was it pushed through all departments. Succession planning was included in the five-year strategic plan but was not part of the daily culture. The instability in the previous two years caused the organization to renege on some of the promises made. This is a common consequence when a formal succession plan is not in place (Vivian & Hormann, 2015). With the sudden change in leadership in 2016, the organization was faced with finding a new leader for executive positions.

According to SM1, SM2 and SM5, nepotism was a part of the culture, and this prevents having a fair opportunity at advancement. Three of the case study participants stated that they believed that it is important for the organization to focus on leadership development and focus on developing the human capital. While the other three remained neutral in their comments regarding advancement opportunities within the organization.

SM3 expressed that the organization is moving in the right direction and that he was promoted to his position and believed that succession planning was working in the organization. SM5 stated that SM3 received a promotion eight years ago to CFO from Vice-President of Finance due to his 'connections.' SM3 believed that because others were not aware of the open position and not all promotions go through the HR department that it did not meet the classification of succession planning.

SM4 has been with the organization for over 20 years and stated that he does not plan to retire *anytime soon*. He made mention, that although a formal succession plan does not exist, that subject of creating such a plan needs to be discussed *sooner than later*. SM4 posited that many employees are so ambitious to learn that they receive all the training needed from their supervisors and do not need any more training. SM1 believes that investing in development, focus of the leadership, not able to track performance, and financial resources was crucial to the lack of succession planning.

According to SM6, barriers to maintain a true succession plan within the organization are due to the lack of the experience from the HR department and the inability to grow the organization within the past couple of years. SM6 noted that 2015 and 2016, were difficult years and there was a need to make some significant changes to the executive leadership team in order to be sustainable in the present future. SM6 explained: "I am not trying to make excuses, but our efforts to be successful have hinged on our centers increasing the profitability in order to serve the community and clients in the community programs, and not necessarily on leadership development."

Theme 3: Leadership Development and Investing in Human Capital

Human capital is an investment for any organization. The knowledge obtained, preserved and transferred is a benefit for the successor in a leadership role (Tunheim & McLean, 2014). SM1 has been with the organization for 15 years. SM1 was hired on at this location over a three years ago and has made significant change in leadership development and succession planning throughout the whole company. SM2 was trasnferred from another location and has made strides along with SM1 to set a standard for growth, development and opportunity within the organization. For participants, SM3 and SM4, the successor for SM3 had been previously discussed with the board of directors approximately five years ago. Many of the board members were concerned with the ideas presented because the organization is not family owned. Therefore, SM3 brought SM6 on in an executive role under the leadership of SM1. SM5 declined to comment on the successor information but did express their concern that there are other staff members that need development and there is a need to invest more in future leaders.

A noteworthy change in timing was the exit of the previous executive position. According to SM5: “Unfortunately, the vacant position was not due to retirement but due to lack of execution and improvement. Due to not having anyone available and ready to step in the position.” SM5 has to network with other executive leaders within national ranks, so he is aware of how other branches operate. Professional Development is important for the leader to employ in all departments within all organizations (Knight, 2014).

The organization in this study has managed through difficult times, economic hardships, unexpected and experienced impactful change when the CEO left. SM1 explained that “nepotism started approximately two years ago when one of the executives hired a family member and was placed in a key position within ten months of being hired.” Of the six participants, four believed that nepotism had caused an adverse effect within in the organization.

According to SM1, “The difficulty with staffing and promoting is that everyone wants to lead but seems to lack the desire to receive proper training to do so. SM5 stated that “Organizations need to spend more time on developing human capital and provide training that will equip their future leaders for success”. Participants SM1, SM2, and SM5 (100%) expressed that mentoring and leadership development were important components of succession planning. Participant SM3 stated “he wishes he had someone to mentor him before he had taken over after his father passed many years ago. I learned the ins and outs of the business but to say I had a mentor that would not be true.” Participant SM2 expressed how important it was for an organization to foster a presence of diversity within the organization.

Many organizations only focus on top level succession planning (Dabke, 2016). This is important, but it does not provide rest of the organization with an opportunity to develop and reach its full potential. All participants believed that succession planning is important to the organization, however; Participant SM3 believed that the organizations successor practices is already in place should something happen.

During in-depth interview with participants, questions 1, 3, 4 and 5 were answered. The response to questions 1, 3, 4 and 5, revealed participants experiences and a deep understanding of how important it is to have a succession plan in place. Participants SM1 and SM2 years of experience in developing a succession plan and implementing a succession plan was interesting to hear. Both Participants explained that organizational goals and mission is a priority. Also believed that implementing a succession plan would benefit the organization and allow them to create a pool of individuals who would be ready to lead when the opportunity present itself.

When SM3, was asked: What were some of the effective processes used in your organization for leadership development? The response was “all processes should go through the Human Resource department. People are in position to make things happen and leadership development is for the executive leadership team. The responsibility falls on the lower level managers to develop their subordinates and to promote or hire when needed. SM3 further noted that “as an organization we have grown too fast over the past 10 years and never had an opportunity to focus on developing leadership as we should have.”

Theme 4: Necessary Policy and Procedures for Succession Planning

The findings from this study suggest that the organization, DWS, is not prepared for the shift in workplace dynamics and the rapid changes involving, retirement, downsizing and decreased budgets. The participants discussed the importance of organizational structure and the lack of formal procedures hampering the implementation of a true succession plan. Participants stated that developing the organizations human capital is very important and should be the start of a succession plan. Growing and developing the next generation by expanding the organizations leadership pipeline was a topic of discussion that was revealed during the interview process by participants SM1, SM2 and SM5. SM1 stated that “future leaders need to know what to expect and what it being an executive-level leader entails They need to have an opportunity to see what leaders do and allowed to make mistakes in order to learn”.

Currently, DWS does not have a process for a formal succession planning. SM1 and SM2 stated that within the past year an informal succession plan process has been implemented, which has provided the opportunity for 21 supervisor promotions and 4 senior level promotions. This was the first time in the organizations history that these many promotions were administered in such a short period of time. There was no formal training or education provided before the promotions were approved. The employees did receive the proper training for the position after the promotions were finalized. Based on statements made by participant SM2, there were also a total of six demotions due to poor job performance and four terminations because of failure to follow company policies and poor personal conduct.

Of the six participants in this study, five of them stated that Human Resource handles the informal succession plan, promotions, demotions and terminations. Participant SM1 created a spreadsheet that allows management and supervisors to enter employees name and rate their performance, skills, readiness, development needs, and knowledge and advancement opportunity. SM1 said "It's not about having people…it's about having the right people, in the right place, at the right time". The process allows location managers and supervisors to announce the available position internally through email, post the job description in all locations, interview for the position and make a decision.

Succession planning is about having a strong pool of people ready to assist and support the organization when needed. The strategies used to develop talent within the organization should include succession plan mapping and support organizational culture

(Schuller et al., 2015). The process of succession plan mapping would allow the organization to create a succession guide for every position, including competencies, skills, ideologies, know-hows and distinctive personality traits to succeed in the position. Succession planning is developing, training, mentoring and identifying key individuals with the essential skills desired to advance to a senior level position within the organization (Patidar et al., 2016).

The key to developing and implementing a formal succession plan is determining to nurture a talent pipeline that aligns HR goals with organizational strategy and have an organization that attracts external people for talent gaps. The fundamentals to providing the necessary policies and procedures for succession planning is essential to structure of the organization (Johnson, Pepper, Adkins, & Emejom, 2018). With policy and procedures in place organizations can measure the success and failure of the process. Succession planning also allows the organization to identify low experienced talent and develop that employee. With policy and procedures, the organization has structure to implement a formal succession plan (Santora, & Bozer, 2015).

Applications to Professional Practice

The purpose of this exploratory single case study was to explore strategies NPO leaders use to develop future generations for leadership roles within the organization. Previous studies described the importance of leadership succession planning (Jacobson & Sowa, 2015). The findings of this study support previous research (Gray, 2014; Swensen et al. 2016) to ensure the preparedness of leadership, executive leadership and management team for succession planning purposes.

Succession planning is part of the leadership development platform for many organizations. Leadership development strategies are essential factors of an organizations strategic plan or human capital development to hire, fill, promote internally and maintain leadership talent (Collins, 2013). Executive leadership readiness is critical to the stream of business and assures all that there is a plan of succession. An organization that implements effective succession planning strategies has insightful inferences to sustainability and the continuance of the organization mission (Tebbe, Stewart, Hugues, & Adams, 2017).

The discoveries and findings of this study contribute to the existing literature on succession plan and leadership development. The information discovered from the collecting data and analysis indicated a formal succession plan is missing from the organizations core strategy. There is a need for all organizations, especially nonprofits, to create a formal succession program and to ensure that employee skills, knowledge, and development are identified (Cole & Harbour, 2015).

In theme one, the need to adhere to a Formal Succession plan, the participants expressed the importance of everyone adhering to the same strategies for leadership development; revamping the organizational culture and creating a culture where the human capital is of paramount importance. Many participants expressed their concern for the organizational leader’s lack of urgency to strengthen the leadership skills of employees.

In support of theme two, Removing Barriers to maintain a Succession Plan, many of the participants expressed their concern about not having a formal succession plan in place. Succession plans and strategic reflect the organizations corporate plan (Cole & Harbour, 2015). Out of the six participants interviewed, 64% believed that in order to be consistent, everyone should be able to receive some type of training and development to help each person reach their full potential and make advancements within the company. The other 36% believed that the organizations were heading in the right direction and would continue to revisit the strategic plan to make sure the organizations missions and goal are aligned.

In theme three, Leadership development and investing in Human Capital, participants expressed their concern regarding the entire work environment needs to be onboard with the succession program. Organization leaders must ensure potential successors have the required skills, involvement and knowledge to (Gohar et al., 2015). Transfer of knowledge and training is essential for employee development and continuous growth for the organization. Organizational leaders are responsible for development of the human capital and to ensure success of the organizations mission.

The fourth theme, Necessary policy and procedures for Succession Planning, there was a lack of consensus. Four participants believed that strategic goal of implementing a succession plan was not clear. The other two stated that that strategic goal of implementing a succession plan was clear and direct. This disparity is likely attributed to the differences in personal experiences.

Two-way communication is significant when it comes communicating the strategic plan of the organization. Organizational leaders have the responsibility to ensure all departments and employees are aware of the strategic plan and as leaders that are accountable to provide clear and precise information in order for their followers to understand what direction the organization is headed. Of the six executive leaders and managers interviewed, 100% believed that a formal succession plan and effective leadership development were important for the organization.

The factors identified in the study may indicate leadership development has not been a priority for the organization and developing human capital is not a high priority. With the increased demands to remain competitive in the both NPO and FPO markets, organizations should make sure they have strategic plans in place to develop the future leaders. Succession planning is vital for NPO information gathering, sharing and organization sustainability (Jacobson & Sowa, 2015).

Implications for Social Change

This study findings, conclusions, and recommendations may serve as a foundation for positive social change. Many NPO's are facing changes within the organization that are creating more issues which will affect the financial and competitiveness of the organization (Brunnson, 2015). A well-developed succession plan may increase performance, productivity, job satisfaction, reduce turnover and advancement opportunities. The implications for social change may also lead to developing high-potential employees, possibly provide managers with highly-qualified candidates for leadership roles and improve job satisfaction that will benefits the organization, employees, community and other NPO's. For NPO's, a strategic approach to succession planning might contribute to positive social change by increasing the stability and profitability of an organization which will allow the organization to provide more services for the community it serves.

Recommendations for Action

Research and business practitioners have explored various concept and strategies assessing organizational requirements and for creating an environment that promotes sustainability (Epstein & Buhovac, 2014). The target population consisted of leaders in a NPO in Houston, Texas, who developed strategies for forming future leaders within their organization. Case study approach have been used by many researchers in order to examine why organizations have no formal succession plan in place. The findings of this study offer NPO leaders an opportunity to consider the following recommendations for implementing practices and procedures regarding succession planning. These recommendations include: (a) creating and implementing a formal succession plan that includes policies, procedures, and processes to retain, educate, train, develop personnel; (b) creating a succession committee team to address the succession planning needs of the organization; (c) a formal succession plan be considered, formed, communicated in a way that ensures accountability, consistency and uniformity for all departments within the organization; and (d) consider implementing a leadership development program with a connection to the strategic and succession plan within the organization.

Recommendations for Further Research

This study focused on one nonprofit organization in the service sector in Houston, Texas. Because this study was limited to Houston, Texas, I would recommend future researchers conduct a similar study in another geographical area. I would also suggest expanding the research to analyzing training and development programs, human capital, and employee turnover. Conducting a study to conquer a deeper understanding of nonprofit strategies may add to the depth of understanding required to assist nonprofit leaders to overcome the continuous struggle for sustainability, leadership development and succession planning.

Succession planning is a process that allows the organizational leaders to grow and develop future leaders. My second recommendation is for future researchers to conduct a similar study using other NPOs that have an effective strategy for developing and focusing on their human capital. During the interviews, I discovered that many leaders have their own ideas of developing human capital and how this affects the organization. There needs to be a coherent plan that the organization follows. Next, I would recommend that this study be extended to the rest of the organization employees. By expanding the sample size, transferability will increase. Also, by increasing the number of employees interviewed, the researcher may gain more knowledge on the organization's strategy and sustainability from the other viewpoints and add to the generalizability of the findings.

Reflections

Reflecting on my experience while attending Walden University, I experienced a range of different emotions and challenges. I believe that this journey has better prepared me for the future challenges and success. In my first class at Walden, I was excited and nervous at the same time. I was proud of myself for starting this journey because this was something I had thought about doing for many years. There were times that I felt as if I was not capable to complete this study and other times, I felt inspired by my parents, family and friends to continue moving forward. Throughout the entire process, I encountered many obstacles which made me feel as if I wanted to give up. After returning from my first residency, my previous wife, the mother of my children, and was on life-support, but she survived. This was a hard time for everyone, as I was trying to stay ahead by working on assignments while sitting at the hospital and rehabilitation facilities.

I was going through the process of attending class and doing the weekly assignments but seemingly not moving anywhere. I gathered my thoughts and started to head in the right direction and then I remarried, had a son born a few months later and said good-bye to my mother all in the same day. The death of my mother took its toll on me. Thanks to some good people supporting me but also knowing that my late mother wanted me to finish helped me to push through the trials and tribulations. I made some sacrifices and pushed myself to complete this journey.

My original thought process in conducting this qualitative case study was to build my competence as a researcher while exploring business practice that could improve leadership development, human capital value and succession planning. I learned that this journey is not only about conducting research or being called Doctor Theus. The end result is about pursuing my passion and being positive social influence in the communities. This process involves transferring of knowledge, professional and personal growth, and forwarding skills into practice.

In the development of my study, I learned the importance of attention to detail. The advice I received from classmates and others who had completed this process was to stay focused and follow the university guidelines. That message stayed with me with great assistance from my committee chair. I became excited when my proposal made it to the second committee member, and I struggled move forward, eventually she gave me valuable feedback and I moved to the next level. I followed the same process and celebrated each step. Analyzing data from the interviews and company documents received, and the emergent themes aligned with the conceptual framework. The Walden University doctoral study process was an experience to remember; humbling yet gratifying,

Conclusion

The purpose of this qualitative single case study was to explore the Strategies for Succession Planning and Leadership Training Development for NPOs. The qualitative single case study included the views and experiences of six participants; four executive staff and two leadership positions of this organization with no formal, but an informal succession plan in place. There is a need for NPO leaders to develop future generations of leaders and prepare them to assume leadership roles within the organization.

Leadership has a great deal to do with perception regarding where the organization is and where it is heading. Leaders need to focus on being committed to development of future talents, succession, and sustainability of the organization human capital. If there is not a commitment to succession planning for the organization, there is no investment in sustainability, human capital or the future of the organization.

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Appendix A: Interview Protocol

Interview Protocol	
What you will do	What I will say—script
Introduce the interview and set the stage—often over a meal or coffee.	Hello (face to face interview) _____________. Thank you for agreeing to meet with me. This interview will take about 1-1½ hours. Is that still good for you? My purpose in talking with you today is to learn from your thoughts, state of mind, and experience with succession planning and leadership development.
Watch for non-verbal cues. Paraphrase as needed Ask follow-up probing questions to get more in-depth responses.	1. What was included in your strategic plan for succession planning?
	2. How have you, as a business leader of an NPO, participated in developing the future generation of leaders in your organization?
	3. What processes has your organization used to find leaders?
	4. What were some of the effective processes used in your organization for leadership development?

	5. What factors were considered in the succession plans in your organization?
	6. Please elaborate on different strategies your organization might enact to prepare future generations in assuming leadership roles within your organization.
	7. What other information, if any, would you like to share concerning how you find and develop leadership within your organization?
Wrap up interview and thank participant.	Thank you for agreeing to the audio recorded interview.
Schedule follow-up member checking interview	Script XXXXXXXXXXXXXXXXXXXXXX

Appendix B: Interview Questions

I will use the following semistructured interview questions so participants can explain their experience in depth regarding strategies used to develop human capital and future leaders. The questions determine that there is a need for more information and also confirm why the information is important. Responses to the questions will help to delineate the strategy of succession planning within specific organizations.

- What was included in your strategic plan for succession planning?
- How have you as a business leader of an NPO participated in developing the future generation of leaders in your organization?
- What processes has your organization used to find leaders?
- What were some of the effective processes used in your organization for leadership development?
- What factors were considered in the succession plans in your organization?
- Please elaborate on strategies your organization might enact to prepare future generations in assuming leadership roles within your organization.
- What other information, if any, would you like to share concerning how you find and develop leadership within your organization?