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Nonprofit Leaders' Strategies for Succession Planning

Regenia R. Boykins
Walden University

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Walden University

College of Management and Technology

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Regenia Boykins

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Review Committee

Dr. Rocky Dwyer, Committee Chairperson, Doctor of Business Administration Faculty

Dr. Janice Garfield, Committee Member, Doctor of Business Administration Faculty

Dr. Peter Anthony, University Reviewer, Doctor of Business Administration Faculty

Chief Academic Officer
Eric Riedel, Ph.D.

Walden University
2019

Abstract

Nonprofit Leaders' Strategies for Succession Planning

by

Regenia Boykins

MBA, University of Phoenix, 2015

BS, University of Phoenix, 2013

Consulting Capstone Study Submitted in Partial Fulfillment

of the Requirements for the Degree of

Doctor of Business Administration

Walden University

April 2019

Abstract

Many nonprofit organizations lack systematic approaches to succession planning. The absence of a strategic succession plan can limit leaders' abilities to maintain organizational sustainability and fulfill the organization's mission. The purpose of this single-case study was to explore strategies nonprofit leaders used to develop succession plans. The conceptual framework for the study was the knowledge transfer theory. Participants included 3 nonprofit leaders from an educational organization in the southeastern United States. Data were collected through semistructured interviews and analysis of internal organizational documents and publicly available data. Using an inductive content analysis, 3 themes emerged: boards of directors were critical to the process of developing a strategic plan for succession; leadership transition, whether planned or unplanned, necessitated preparation; and leadership development was a valued practice that contributed to a succession planning strategy. The results of this study might contribute to positive social change by providing nonprofit leaders with succession strategies to recruit, retain, and prepare leaders to ensure organizational sustainability and mission attainment. Nonprofit educational leaders who develop succession planning strategies can enhance organizational continuity and develop competent volunteers to provide much-needed programs for the communities they serve.

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Dedication

I dedicate the completion of my DBA journey to God. To my husband, Hiram, you are the most supporting and loving person I know. I take great honor in calling you my husband and number one friend. To my children, thank you for encouraging me not to abandon my dream of achieving this milestone.

Acknowledgments

Completing this work was only possible through Gods' grace, the love and support of my family, and the remarkable people I encountered through Walden University along the DBA journey. I thank my husband, Hiram, who always believed in me and shares in the sacrifice of time and finances to achieve this goal. I thank my amazing children, Ja'Ran, Ja'Coby, Ja'Hyraika, and Ja'Brellia, for always encouraging me and wanting me to move forward even when I was not available for your important events. I am thankful to God, who has guided my journey and provided a supporting cast in the Walden DBA program, including Dr. Kim Critchlow, Dr. Fred Walker, and Dr. Carol-Anne Faint. To my chairperson, Dr. Rocky J. Dwyer, thank you for your kindness, support, and willingness to always provide guidance. Thank you, Dr. Janice Garfield, my second committee member, and Dr. Peter Anthony, my URR, for your advice and support. To my client organization leaders, thank you for providing your time and knowledge that contributed to my doctoral success.

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Section 1: Foundation of the Study

In this study, I used the 2017-2018 Baldrige Performance Excellence Framework (2017) as a tool to explore succession planning strategies that leaders of nonprofit organizations (NPOs) use. As a requirement of Walden University's Consulting Capstone, I served as both researcher and consultant to an assigned client organization. The agreed-upon focus of my exploration of the organization was strategies that educational leaders of nonprofit organizations use to plan for succession.

Background of the Problem

Alsharari, Dixon, and Youssef (2015) observed that change is unavoidable in organizations. Scholars and practitioners concur that change is inevitable, and everybody in an organization must make the necessary adjustments to adapt to a changing work environment (Kim, 2015). Martin (2015) noted organizational leaders endure challenges in addressing changes because of the turmoil produced by the rapid marketplace within the global economy, an aging workforce, and the need to fill vacant positions with the most qualified person to meet the competitive industry demands. Nonprofit leaders are facing increased competitiveness and the need to leverage opportunities and plan for their future.

Typically, nonprofit leaders are ineffective in developing succession planning strategies to address the depth of their leadership turnover. In approximately 75% of charitable agencies, a formal leadership succession plan is absent (Carpenter & Wozniak-Qualls, 2015; Santora, Sarros, Bozer, Esposito, & Bassi, 2015). A leader's lack of developing and implementing succession planning strategies adversely influences their

ability to help ensure organizational sustainability and mission fulfillment (Dalpiaz, Tracey, & Phillips, 2017). To adapt to industry changes, a changing workforce, and a changing culture, leaders should construct succession planning strategies as part of their organizational framework (Dalpiaz et al., 2017). Stewart (2017) posited that leaders' succession planning mitigates systemic inefficiencies and helps nonprofit organization leaders maintain the continuity of their business operations.

Problem Statement

The projected departure of nonprofit executives from the workforce may accelerate the risk of a leadership void (McKee & Froehlich, 2016). Researchers conducting a series of 11 independent surveys from 2006 through 2015 determined that 24% of nonprofit leaders did not incorporate succession plans in their business planning (Santora & Gil, 2015). The general business problem was that some nonprofit leaders do not effectively plan for succession, resulting in diminished resources, the inability to serve those in their communities, and sustainability threats. The specific business problem was that some nonprofit leaders lack strategies to develop succession plans.

Purpose Statement

The purpose of this qualitative single-case study was to explore strategies nonprofit leaders use to develop succession plans. The targeted population comprised three leaders of a nonprofit organization located in the southeastern United States. The implications for positive social change include the potential to provide insights to nonprofit leaders on strategies to develop succession plans, which may enable the nonprofit organizations they lead to sustain their mission of serving communities.

Nature of the Study

In this study, I used the qualitative approach. Researchers use the qualitative method to explore a problem or condition through the lens of those undergoing it (Yin, 2018). A qualitative method was suitable for this study because I explored strategies that nonprofit leaders use to develop plans for succession. I conducted this exploration by gathering data and information from nonprofit leaders who have sustained continuity of operations via a systematic approach to succession planning. Researchers use the quantitative method to test hypotheses and examine relationships among variables (Kozlowski, Chao, Grand, Braun, & Kuljanin, 2013). The quantitative method was inappropriate for this study because I did not test hypotheses or examine relationships among variables. Using the mixed method is suitable when the researcher chooses to merge quantitative and qualitative methodologies (Green et al., 2015). The mixed method was not appropriate for this study because there was no quantitative component to this study.

Qualitative research designs include case study, ethnography, and phenomenology (Yin, 2018). Researchers employ the case study design to explore a phenomenon in its context when the boundaries between phenomenon and context are not apparent (Yin, 2018). Using the single-case study design was appropriate for this study because I sought to explore the research problem in depth within a nonprofit organization, gaining information from interviews, documents, and reports. Ethnographic researchers conduct extensive and detailed studies of individuals and their cultures within a natural setting, and they explore the aspects that contribute to cultural distinctiveness (Dawson, 2014). I

did not intend to explore the cultural patterns and perspectives of the participants of this study; therefore, the ethnographic research design was inappropriate for this study. If a researcher desires to explore the lived experiences of people concerning a phenomenon depicted by them, the phenomenological design is appropriate (Yin, 2018). Use of the phenomenological approach was not appropriate for this study because I did not describe the lived experiences of participants.

Research Question

The central research question of this study was: What strategies do nonprofit leaders use to develop succession plans?

Interview Questions

The interview questions for this study were:

1. How do you develop succession plans to help ensure the continuity of your business operations?
2. What strategic factors of importance to the organization did you consider in planning for succession?
3. What key challenges did you face in developing succession planning strategies?
4. What are your key performance metrics for evaluating the effectiveness of your strategies for succession planning?
5. What additional information can you provide regarding succession planning strategies you use to help ensure the continuity of business operations?

Conceptual Framework

I used the knowledge transfer theory as the conceptual framework for this study. The knowledge transfer concept has a foundation in the research of Woodworth and Thorndike (1901) regarding how human minds can learn and improve in performing activities. Following researchers implemented Woodworth and Thorndike's (1901) inquiry into mental acuteness to construct learning and training models (Belenky & Schalk, 2014). The key constructs underlying knowledge transfer are Nonaka and Takeuchi's (1995) knowledge creation theory (i.e., tacit and explicit), knowledge management in organizations (Wong, Tan, Lee, & Wong, 2015), and knowledge sharing between people and within organizations (Park & Kim, 2018).

Csizmadia, Makó, and Heidrich (2016) highlighted knowledge transfer as a critical factor in succession planning. Failure to transfer knowledge from departing executives may cause a reduction of organizational knowledge accrued by the successor (Csizmadia et al., 2016). In measuring succession processes, one variable linked to the quality-effectiveness of the process is knowledge transfer. Transferring tacit knowledge to successors improves the succession planning process and organizational performance (Sibbald, Wathen, & Kothari, 2017). When leaders implement strategies for efficient peer-to-peer knowledge transfer in an organization, greater organizational sustainability is achievable (Kodam, Eardley, & Bolli, 2016).

Operational Definitions

Generational cohort: A group of individuals born within a certain period functioning in the same work environment (Chaney, 2017).

Knowledge management (KM): A process to manage tacit organizational knowledge (informally shared) and explicit knowledge (formally codified), which exists within the organization's people, processes, and technologies for improving their performance, competitiveness, and sustainability (Wong et al., 2015).

Knowledge transfer: The movement of organizational information from a source of knowledge to a knowledge recipient (Law, 2016).

Nonprofit organization (NPO): An organization driven by mission and not profits (Agarwal, Chakrabarti, Brem, & Brocken, 2018).

Succession planning: A future-focused business process that provides an avenue for leaders to identify and prepare likely successors to assume new roles with minimal disruption to the organization's operations (Manning, Jones, Jones, & Fernandez, 2015).

Assumptions, Limitations, and Delimitations

Assumptions

Assumptions are concepts that a researcher accepts as truth but are unproven (Grant, 2014). In this study, I assumed the participants would give accurate and transparent responses to the interview questions and complete access to organization information and archival data. Furthermore, I assumed that using the 2017-2018 Baldrige Performance Excellence Framework and criteria would assist in ensuring an in-depth review of my client organization's strengths and opportunities for improvement.

Limitations

Limitations are probable weaknesses in a study that are outside a researcher's control (Yin, 2018). The first limitation of this study was the small sample size. The

sample size for this single-case study included three leaders of a NPO. The second limitation was the possibility of respondent's inaccuracy and lack of complete honesty in responding to interview questions. The final limitation was that the perspectives of participants may not have represented the perspectives of nonprofit leaders at other organizations or in other industries.

Delimitations

Delimitations are the choices made by researchers to limit the scope of a study, such as limiting the population and eligibility criteria for a target population (Marshall & Rossman, 2016). Delimitations of this study included the (a) sample size consisting of three leaders, (b) targeted population comprising leaders from a single NPO, and (c) geographical location in the southeastern United States. A final delimitation involved interviewing only the leaders of the NPO who implemented succession planning strategies.

Significance of the Study

Contribution to Business Practice

The results of this study could add value to the practice of business because my exploration of succession planning strategies may allow nonprofit leaders to become active in planning for their departure. Chiochio and Gharibpour (2017) noted when leaders fail to create succession plans, it impacts their ability to serve their constituents and their ability to sustain their organization. The contributions of this study to practitioner application might establish a foundation for the business practice of formal succession planning in NPOs. Using the outcomes of this study may enable nonprofit

leaders to initiate the process of developing future leaders and formulating systematic approaches to the development of a formal succession plan.

Implications for Social Change

The implications for positive social change include the potential to assist nonprofit leaders in their support of communities through sustainable, educational NPOs that are proficient, organized, and have leadership continuity. Nonprofit leaders might use the findings of this study to help take a practical and proactive stance in succession planning to ensure that they continue to achieve their organizational goals and objectives. Communities benefit when educational base NPO services are available

A Review of the Professional and Academic Literature

In this qualitative single-case study, I explored the strategies that nonprofit leaders use for succession planning through the lens of knowledge transfer. Csizmadia et al. (2016) stressed knowledge transfer plays a significant role in the succession planning process. The occurrence of leadership succession with inadequate or the absence of knowledge transfer activities results in tacit and explicit knowledge loss (Massingham, 2018; Sibbald et al., 2017).

This literature review will begin with a discussion of the conceptual framework, knowledge transfer, which incorporates knowledge transfer theory, knowledge types, knowledge transfer in practice, and its applications to succession planning and a multigenerational workforce. I will then provide an overview of NPOs and focus on the topics of performance, leadership, and sustainability. A review of the extant literature concerning succession planning will also be presented to explore the roles of leaders and

the organization, leadership development, board effectiveness, and ethics. Following this will be an overview of NPOs, their performance, leadership, and sustainability. Next, I will review the various essential qualities and qualifications for a nonprofit leader. I will also address the multigenerational workforce by conveying descriptions of baby boomers (i.e., boomers, born between 1946 and 1965); Generation X (i.e., Gen X, born between 1966 and 1979); and Generation Y (i.e., Gen Y, also known as millennials, born between 1980 and 1995) who are currently engaged in the client organization's workforce. The workforce comprises volunteers functioning at various levels who are instrumental in accomplishing the organization's work (Baldrige Performance Excellence Framework, 2017). A discussion of multigenerational volunteers in the workplace, including boomer retirement trends, will also be provided. Further discussions will include multicultural leadership considerations and references to different types of organizations in various business sectors. The literature review will conclude with a discussion addressing leadership transition.

In this study, I explored the strategies nonprofit leaders use to construct succession plans. My search for peer-reviewed journal articles and books began with Walden University's Library. I also used the Google Scholar search engine and Google Scholar Alerts to attain access to the most up-to-date scholarly literature regarding the search terms. Alert terms incorporated keywords and combinations including *nonprofit*, *succession*, *succession plan*, *succession planning*, *executive turnover*, *leadership transition*, *baby boomer*, *Generation X*, *Generation Y*, *leadership development*, and *knowledge transfer*. To support the study, I accessed research databases to attain

scholarly documents, which included Academic Source Complete, Business Source Complete, and ProQuest. I incorporated the ensuing key topics in the literature review: knowledge transfer, succession planning, the roles of leaders and organizations, leadership development, NPO sustainability, ethics, board effectiveness, and multigenerational workforce. The terms I used to search the databases included *board effectiveness, sustainability, change management, organizational change, human resources, generational workers, multiculturalism, strategic planning, leadership tenure, and retirement trends*. Research information for the literature review encompassed articles from 154 sources, with 93% of the articles published within 5 years of my anticipated graduation date (see Table 1). Furthermore, 97% of the 154 total sources were from peer-reviewed journals.

Table 1

Literature Review Source Content

Literature review content	Total #	# Within in 5-year range (2015-2019)	% Total peer reviewed within 5-year range (2015-2019)
Books	2	0	0%
Peer-reviewed articles	149	139	93%
Dissertations	1	1	100%
Online resources	2	3	100%
Total	154	143	93%

I used the purpose statement and research question to develop the content of the literature review. I assumed the literature findings might provide insight for future

research and for the design of comprehensive nonprofit succession planning strategies. The purpose of this qualitative single-case study was to explore the strategies that nonprofit leaders use to develop succession plans.

The target population for this study consisted of three senior leaders (SL) of a single NPO located in the southeastern United States who had implemented succession planning strategies. The implications for positive social change include the potential to enrich the understanding of strategies nonprofit leaders use to develop succession plans, which may enable nonprofit leaders to sustain their mission of serving communities.

Informed Consent

I secured informed consent from the participants of the study before conducting research to adhere to Walden University's and ethical requirements. Informed consent is a legitimate, moral, and regulatory obligation and a vital facet of research concerning human beings that underpins principled behaviors in performing research (Grady, 2015). Obtaining informed consent before a study is an ethical and legal obligation of a researcher (Henderson & Gross, 2017). In an understandable language, researchers must convey to prospective study participants their rights as human subjects, an overview of the purpose of the study, and the discomforts and benefits of taking part in the research (Petrova, Dewing, & Camilleri, 2016; Sanjari, Bahramnezhad, Fomani, Shoghi, & Cheraghi, 2014; Woodward-Kron et al., 2016).

Understanding the fundamental nature of informed consent and ethical principles and assuring proper research governance can help to ensure trust and clarity in securing informed consent (Woodward-Kron et al., 2016). Woodward-Kron et al. (2016) explored

the barriers to patients participating in medical research from the stakeholder's perspectives. Their findings revealed that mistrust and ambiguity in the research process diminishes participation and unethical practices play a significant role in research participation. To diminish barriers in acquiring informed consent, Birt, Scott, Cavers, Campbell, and Walter (2016) suggested integrating consent procedures to facilitate participation in a study. Marrone (2016) proposed aligning informed consent procedures with the guiding ethical principles of autonomy, beneficence, and justice defined in the *Belmont Report*. Specifically, steps to decrease barriers may involve leveraging the three principles when designing studies (Sabar & Ben-Yehoshua, 2017). For example, autonomy or respect for persons become demonstrated by obtaining meaningful informed consent and recognizing that several approaches may be necessary when communicating information concerning the study (Henderson & Gross, 2017; Marrone, 2016). In providing a clear disclosure of information that includes an explanation of a recording, an interview transcription, and an analysis of the data, ambiguity lessens, and trust becomes enhanced (Grady, 2015; Killawi et al., 2014; Reder & Kolip, 2015). Sobel and Dreyfus (2017) believed that individuals provide information to researchers who engender trust.

The procedures for obtaining informed consent, minimizing intrusion into a participant's autonomy, sustaining confidentiality, collecting accurate and appropriate data, and ensuring participant data protection was a vital responsibility for me (see Sanjari et al., 2014). Petrova et al. (2016) asserted granting opportunities for participants to ask specific content-related questions about the consent and confidentiality process facilitates their understanding of the informed consent procedures.

Participants are at the center of a research project and their preferences are paramount to its recruitment and overall success (Killawi et al., 2014). A prerequisite of the Walden University's Institutional Review Board (IRB) approval procedure stipulated providing written verification of informed consent from all participants. In studies involving human subjects as participants, it is a common practice for research ethics committees or IRBs to seek documented proof of consent in a written and signed form (Sanjari et al., 2014). I acquired IRB approval (#04-07-17-0665213) for this study through submitting a request to Walden University's IRB (see Walden, 2017). The approval ensured that my study followed federal guidelines and adhered to the requirements of Walden University. I adopted the perspective that the results from this study might validate the significance of informed consent when exploring NPOs through the lens of knowledge transfer as the conceptual framework.

Knowledge Transfer

Knowledge transfer theory was the conceptual framework that I used to depict the succession planning strategies in a NPO. KM is a process of opening communication channels and cultivating knowledge transfer within an organization's culture and training activities to build and improve the performance of people and ultimately the entire organization (Wong et al., 2015). An important concept in a knowledge-based economy is having insight into the sources and types of knowledge. Both Polanyi (1966) and Nonaka and Takeuchi (1995) are formative contributors to the KM theory. The explanation of knowledge as either tacit or explicit is a central tenet of the theory (Polanyi, 1966). Tacit and explicit knowledge are comprised of the knowledge resources

used in KM (Wong et al., 2015). Organizational leaders should understand KM to systematically store, transform, and transfer knowledge throughout the organization (Bharadwaj, Chauhan, & Raman, 2016).

Knowledge transfer is goal-orientated, whereas it embraces the individual, the group, and the organization as actors of knowledge transfer (Sondari & Akbar, 2016). Omotayo (2015) described the knowledge transfer process as creating, capturing, and distributing knowledge to ensure its availability to future users. Succession planning requires understanding knowledge types and knowledge transfer applications between multigenerational volunteers.

Knowledge transfer theory. The knowledge transfer concept has a foundation in the research of Woodworth and Thorndike (1901) regarding how human minds could learn and improve in performing activities. Belenky and Schalk (2014) illustrated knowledge transfer by applying the concept to mental acuteness mechanisms structured in learning and training. Tacit and explicit knowledge became integrated into the knowledge transfer theory (Lappalainen & Rosqvist, 2015). The external knowledge definition encompass grounded (i.e., previous experience) or idealized (i.e., no previous experience) knowledge (Belenky & Schalk, 2014). External representations such as documents and diagrams influence learning and performance, and they differ in their concreteness. For example, concrete illustrations such as documents and diagrams, are grounded in familiar experiences, connect with learners' prior knowledge, and have an identifiable perceptual correspondence with their referents. However, the documents or diagrams may contain extraneous perceptual aspects that

divert learners from relevant information, which can inhibit the transfer of knowledge to new situations (Belenky & Schalk, 2014). The origin of base knowledge commenced from the variation among education and experimental knowledge, which expands upon the base knowledge attained throughout practice (Massaro, Handley, Bagnoli, & Dumay, 2016).

The initiation of new knowledge in an organization with prior knowledge creates conflict (Nestian, 2016). Knowledge creation occurs through a disruptive leadership transition and becomes apparent through the organization's response (Nestian, 2016). The culture of the organization influences the knowledge transfer events (Wong et al., 2015). Purposely managing knowledge transfer diminishes the adverse impacts of knowledge loss (Massaro et al., 2016).

Workforce changes impose the evaluation of knowledge retention approaches that include what to retain and reject in addition to what new knowledge to advance for the future (Ciutiene & Railaite, 2015). Whenever new knowledge becomes superior to prior knowledge, the company integrates that knowledge (Nestian, 2016). Knowledge creation is reliant on the conversion of knowledge; however, knowledge conversion is possible in the absence of knowledge creation (Nestian, 2016). Preserving practical experiences circumvents a failure in knowledge transfer through justifying the gap amid the knowledge types of tacit and explicit (Ciutiene & Railaite, 2015).

Transferable knowledge types. Researchers have identified two types of knowledge that baby boomers and retiring volunteers encompass: tacit and explicit knowledge dimensions (Sumbal, Tsui, See-to, & Barendrecht, 2017). Scholars have

accentuated the value of the tacit or implicit knowledge that boomers and retiring volunteers hold because of its significance to the organization (Massaro et al., 2016). Boyd, Royer, Pei, and Zhang (2015) posited explicit knowledge (e.g., general knowledge) becomes transferable effortlessly to individuals within the structure of procedures or documents. In contrast, technical knowledge necessitates people with comparable experiences to communicate and share it (Barzinpour, Jafari, & Biuki, 2015; Kodam et al., 2016). McQueen and Janson (2016) noted sharing tacit knowledge presents more challenges; however, sharing tacit knowledge proposes a more significant potential concerning the formation of confining mechanisms.

The principal objective of using KM in a firm is to convert tacit knowledge into an explicit form and encourage its dissemination among members (Mazilescu, 2016). To satisfy this objective, Nonaka (1994) along with colleagues (1995, 2006) presented the socialization, externalization, combination, and internalization matrix of tacit/implicit knowledge conversion that is highly visible throughout the KM and organization management literature.

Explicit knowledge. Explicit knowledge is a type of knowledge that is formal and systematic (codified) and shared through writing, speaking, and diagramming (Nonaka & Takechi, 1995). Nonaka and Takechi's (1995) theory of knowledge creation postulated that individuals, through social engagement (socialization), necessitated information to attain functional growth. Organizational leaders manage identified information to enhance and establish new information through amalgamating the tacit knowledge and transforming it into explicit knowledge (e.g., externalization: Nonaka &

Takeuchi, 1995). The combination process (integration or incorporation of varied methods) converts explicit knowledge into a simplified type. The authors' model exhibited explicit knowledge transfer constructed on individuals' tacit knowledge through translating theory into practice (internalization). Illustrations of explicit knowledge include concurrent operations plans, written standard practices, manuals, procedures, databases, and electronic learning. Many educational institutional leaders rely on reports, handbooks, and procedure manuals to disseminate knowledge. Nevertheless, written knowledge such as procedures cannot achieve validity without a tacit (hands-on) experience.

Tacit knowledge. Polanyi (1966) termed tacit knowledge as individual's skills, ideas, and experiences embodied in their minds thus, problematic to access or to articulate. Evans, Dalkir, and Bidian (2015) explored Nonaka and Takeuchi's (1995) KM model and characterized tacit knowledge as complex, uncodified, implicit, challenging to articulate, internalized, abstract, and idiosyncratic. Tacit knowledge is a strategic resource, which necessitates capturing, storing, and distributing throughout a firm (Mazilescu, 2016). Small NPO members transfer tacit knowledge to facilitate operational sustainability (Granados, Mohamed, & Hlupic, 2017). Granados et al. (2017) further conveyed tacit knowledge held by an individual, then handed over could become tacit knowledge in another individual through individuals or group social interactions (socialization) such as individual face-to-face interactions, shared experiences, feelings, emotions, and mental models; therefore, expanding existing tacit knowledge.

Nonaka and Takeuchi (1995) explicated socialization as a *re-experiencing*, a process in which those receiving knowledge gain insights into the context by which the knowledge subject to transmission became created. In a comparable nature, tacit knowledge can become transferred into explicit knowledge through an externalization process by conceptualizing and articulating the explicit knowledge. The externalization process embodies the collective and face to face interactions whereas mental models and experiences become shared, converted into standard terms and articulated as concepts, stories, and analogies; henceforth, facilitating the conversion of tacit knowledge to explicit knowledge. Klenke (2018) noted the transference of tacit or implicit knowledge within organizations does not smoothly flow because its tacit elements hinder its mobility; however, tacit knowledge often forms the backbone of organizational routines and the ability to create products and services. Klenke argued that the embedment of tacit knowledge exists in the experiences and backgrounds of individuals or groups and is highly idiosyncratic. Kodam et al. (2016) expressed 80% of the knowledge in organizations is tacit and boomers held a significant amount of organizational knowledge.

McQueen and Janson (2016) assessed tacit knowledge transfer from the perspective of its acceleration and building mechanisms to improve its effectiveness for implementation. They argued that the transference of tacit knowledge is a process of actions. Through social interactions among members working collaboratively such as in group tasks or seminars presents an avenue for guiding tacit knowledge. Additionally, the authors expressed that tacit knowledge resides in individual experiences, and its structure is procedural rather than declarative. Even though tacit knowledge is problematic to

convey and codify, an abundance of researchers supported its significance to impacting individual and organizational performance. Sung and Gibson's (2015) review of technical knowledge transfer revealed four vital aspects in knowledge transfer, which include communication, distance, equivocality, and motivation. Communication regards the ability of a medium to convey task-relevant information and media whereas distance encompasses physical and cultural proximities. Equivocality is relative to the degree of concreteness of knowledge transference and motivation embraces the inducements for and the acknowledgment of the significance of knowledge transference events.

Evans et al. (2015) asserted tacit or experiential knowledge is personal and difficult to convey. Tacit knowledge contrasts with explicit knowledge for instance, a document, which by attaining formalization and methodically presented can become conveyed easily and disseminated within the workplace and throughout communities (Stahl & Buckles, 2016). Buttressing the significance of communication, Natalicchio, Ardito, Savino, and Albinoko (2017) contended transferring tacit knowledge is increasingly reliant on face-to-face interactions within organizational collaborations throughout the knowledge transfer process.

Knowledge transfer in practice. Valuable knowledge concepts of experienced leaders encompassed subject matter expertise, expertise regarding business relationships and social networks, organizational knowledge and institutional memory, and knowledge of governance (Sumbal et al., 2017). The loss of knowledge impacted an organization's performance, revenue, and staff training (Massingham., 2018). Knowledge transfer activities in organizations were inconsistent (Sumbal et al., 2017).

Oliva (2014) posed knowledge is apparent when thought and experience interface on an unknown that leads to the light. Oliva supported Polanyi's demarcation of knowledge as explicit knowledge and tacit knowledge. Virtanen (2013) viewed tacit and explicit knowledge as a continuum rather than two distinct types: thereby, observed as knowledge having both tacit and explicit dimensions. Virtanen's perspective of Polanyi's philosophy aligned with the claim that all knowledge holds tacit information. The knowledge structure's resulting from this perspective comprised of conditioned knowledge, procedural knowledge, and semantic knowledge. Kearns, Livingston, Scherer, and McShane (2015) depicted an analysis of leader's knowledge that included proficient organizational information such as technical knowledge, the organization's purpose and its identity, understanding of operations and how to succeed in a shifting environment.

In the existence of trusting and strong relationships among organization volunteers, the volunteers' readiness to participate in knowledge sharing activities were visible (Massingham, 2018). The formation of personal relationships in social networks motivated individuals to work in ways that benefited each other, which is an objective of sharing tacit knowledge (Huang, 2017). Face to face interactions was effective in externalizing and transferring tacit knowledge among volunteers (Mazilescu, 2016). It was beneficial to the organization when outgoing leaders conveyed their tacit knowledge (Sibbald et al., 2017). The adoption of collaborative working relationships supported the success of knowledge transfer events in executive succession (Boyd et al., 2015).

An essential element of succession planning was knowledge transfer. The incumbent's circumstances such as retirement, death, illness, promotion or termination, levied what knowledge became transferable to their successor (Alvani, Souteh, Jandagh, & Inaloo, 2016; Csizmadia et al., 2016). In executive succession planning, the successor and the organization availed from the transfer of technical knowledge, leadership knowledge, and knowledge related to organizational processes (Barzinpour et al., 2015). The loss of expertise and knowledge loss was evident when an executive departed abruptly (LeCounte, Prieto, & Phipps, 2017). Alvani et al. (2016) purported the core objective of a comprehensive succession plan should be to transfer knowledge possessed by leaders prior to leaving the organization because of retirement or voluntary departure. Knowledge loss negatively impacted organizational performance (Lin, Chang, & Tsai, 2016).

Organizational size influenced knowledge transfer. Leaders in small-to-medium sized enterprises (SMEs) faced unique KM challenges that were distinct from those of larger firms (Wang & Yang, 2016). In SMEs, informal methods of knowledge transfer were common compared to formal modes of knowledge transfer (Sondari & Akbar, 2016). A challenge for many SME members was facilitating formal knowledge transfer activities (Shrafat, 2018). SME members experienced unique difficulties in KM because of deficiencies in personnel resources, a lack of internal knowledge use, and the reliance on informal knowledge sharing procedures instead of formal knowledge sharing procedures (Väyrynen, Helander, & Vasell, 2017). Leaders in SMEs found it difficult to retain competent volunteers (Baporikar, 2016) particularly because a correlation exists

between knowledge transfer and volunteer retention (Sondari & Akbar, 2016).

Knowledge transfer was a competency to resolve unique challenges; however, the training did not address this factor (Belenky & Schalk, 2014).

Knowledge transfer, succession, and multigenerational workers. The heightened concern for organizations and employers rapidly aging workforce entering retirement, produced different connotations in knowledge transfer (Ng & Parry, 2016). Knowledge transfer events were interactive but difficult when required across the generational groups whereas the patterns of communication varied (Sanner-Stiehr & Vandermause, 2017). Intense tensions and conflict transpired between generational members, limiting the type and quality of interactions (Urick, Hollensbe, Masterson, & Lyons, 2016). Using Sambrook's model for succession planning over time, Wadeson and Ciccotosto (2013) posited intergenerational change was a detracting factor in succession that influenced the outcomes. Boomers, Gen X, and Gen Y communicated using technology at various levels and in multiple aspects, which impacted knowledge transmission (Klenke, 2018). Researchers addressing the communication gap amid generations suggested Gen Y's preference for technology transformed how industries communicated and how knowledge became transferred (Bauman & Shcherbina, 2018).

Generational volunteers did not proactively connect with each other via knowledge transfer (Solaja & Ogunola, 2016), which can be a potential impediment in executing succession planning. In some business sectors, technological developments in KM permitted younger employees to acquire concepts and methods in a shorter span. Due to technological developments, more organizational process knowledge became

captured and retained from the departing generation (Ciutiene & Railaite, 2015; Sumbal et al., 2017). Effective communication aligned with job satisfaction for those planning to retire. They encompassed motivation to work as well as transfer knowledge to younger cohorts (Massingham, 2018). Typically, social interaction illustrated as a stronger motivator for members than a monetary inducement to apply knowledge transfer (Ciutiene & Railaite, 2015). The dimension of tacit knowledge younger volunteers required was from guidance and experience from the older volunteers (Sumbal et al., 2017). The experience influenced an individual's prioritization of projects as well as problems but did not apply to knowledge transfer because each person's experience was uniquely theirs (Sumbal et al., 2017).

Succession Planning

Considering the business process of succession planning was to reflect on how to keep the organization's engine running throughout change (Dalpiaz et al., 2017). The dynamic, proactive process included identifying potential candidates to backfill leadership positions, clarifying leadership job functions, establishing assessment criteria, motivating volunteers to develop in the work environment, ensuring effective communication, and establishing a collaborative relationship between the incumbent and the successor (Dalpiaz et al., 2017). A strategic succession management process impacted the organization's sustainability through recognizing current and future organizational needs and retaining qualified and ethical leaders through planned leadership development (Chiocchio & Gharibpour, 2017).

Planning for succession facilitated a positive leadership transition (Perrenoud & Sullivan, 2017). In the existence of a succession plan, the anticipated predicament of an organizational leader departing, along with the loss of tacit knowledge was far less damaging than expected (Berns & Klarner, 2017; Perrenoud & Sullivan, 2017). A knowledge-based approach helped leaders in analyzing how the organizations created, acquired, applied, and transferred knowledge, which was advantageous for succession development (Ali, Sun, & Ali, 2017). The retirement trends of boomers imposed the need for organizations to proactively focus on succession planning (Gilliam, Chandler, Hajjaj, Mooney, & Vakalahi, 2017).

Keeping the leadership pipeline filled through an executive transition involved various moving parts, multiple people, and decision points (Stewart, 2017). Sustaining a pipeline of qualified potential leaders, represented a fulfilled objective for leadership effectiveness (Patidar, Gupta, Azbik, Weech-Maldonado, & Finan, 2016). The dynamics of performance, communication, and capacities to retain the predecessors' knowledge and skills was mutual aspects in efficiently assessing the experience of an incumbent, which facilitated a successful nonprofit succession process (Drury, 2016; Perrenoud & Sullivan, 2017). Experienced boomer leaders in NPOS lead and motivated a diversified group of people, worked across organizational boundaries, improved efficiency, and achieved growth (Gilliam et al., 2017). A lack of quality experience and leadership development activities might be a perceived impediment to passing the baton of leadership (Patidar et al., 2018). Succession planning involved a process for incumbents to identify and develop talent to cultivate competitive advantage-based knowledge (Ali et

al., 2017) and to assume the responsibility for leading in an organization (Santora et al., 2015).

Through mentoring and business coaching by the current leader, succession planning ensued (Saletnik, 2018; Manning et al., 2015). To efficiently manage succession activities necessitated the departing leader's dexterity and transparency (Ghee, Ibrahim, & Abdul-Halim, 2015; Lynch, 2015). Many leaders endured challenges because of inept abilities to recruit, train, and manage work personnel (Lynch, 2015). Implementing formal mentoring was a useful succession practice, which benefited the involved participants and the organization (Manning et al., 2015). Formal leadership development necessitated a current leader's recognition of candidates who embodied leadership potential and facilitation as well as affording mentoring to prepare identified successors to acquire leadership experience (Eliades, Jakubik, Weese, & Huth, 2017). In a failed succession, the dynamics of an incumbent's unwillingness to relinquish control and responsibility were the principal aspects contributing to the failure (Daspit, Holt, Chrisman, & Long, 2016; Perrenoud & Sullivan, 2017). A leader's style of functioning demanded acceptance and flexibility, not the command-and-control style (Hollenbeck, DeRue, & Nahrgang, 2015). Idealistically, effective leadership succession became apparent whereas an incumbent relinquished control and practiced nurturing, thus not impeding the succession process (Jaskiewicz, Combs, & Rau, 2015). Volunteers' expectations of transparency in leader's succession plans supported a smooth succession. Smooth successions resulted from prepared successors buttressed through strong relationships with departing incumbents (Ghee et al., 2015).

Organization size had a significant impact on the succession process (Bozer, Levin, & Santora, 2017). Members of smaller educational NPOs that did not have national affiliation exhibited a deficiency in recruitment, engagement, and leadership training (Edmonds, 2016). The gap left the organization in a crisis leadership mode and the vulnerability of not sustaining long-term organizational survival in the founder's absence due to death, retirement or voluntary departure (Edmonds, 2016). Reflecting on the succession process, Santora, Sarros, and Esposito (2014) produced a typology of founder types as leaders through a case study exploration and classified them into four profile groups: destroyer, conscientious, maverick, and controller. The destroyer recognized and destabilized the successor through using strict control (Santora et al., 2014). The conscientious leader recognized and provided mentoring to the successor along with participation from the board via autocratic control (Santora et al., 2014). The maverick did not provide leadership, development or grooming for successors and chose an outside successor while exercising autocratic control (Santora et al., 2014). The controller regulated all aspects of the succession process that included identifying and appointing the successor using autocratic control (Santora et al., 2014). However, only the conscientious leader reached success (Santora et al., 2014). Founders desired the ultimate say in selecting a successor (Santora et al., 2014). A founder may portray selfish behaviors and seek to protect their leadership legacy; nonetheless, a founder who tried to remain a significant influence in the organization became a substantial impediment to a successful leadership transition (Santora et al., 2014). Departing founders making

cognizant decisions to create physical and emotional separation from the organization contributed to the success of a smooth succession (Drury, 2016).

Role of the organization. Organizational approaches for succession planning encompassed proactive measures to attract, hire, identify, and develop candidates to become suitable leadership successors that contribute to organizational development, growth, and sustainability (Martin, 2015). Nevertheless, in many instances, planning for succession did not embrace the succession management constructs of talent management and relational aspects (LeCounte et al., 2017). Furthermore, some leader's succession management strategies lacked structure for forecasting leadership vacancies (Peters-Hawkins, Reed, & Kingsberry, 2018). The degrees of succession instability linked to unstable organizational events. Researchers indicated that stability in leadership was vital because it was relational with effective, stable leadership and organizational success (Peters-Hawkins et al., 2018). Developing an organization to meet future needs, leaders included leadership development and talent management in the succession plan (Ballaro & Polk, 2017).

Consistent succession plan evaluation was mandatory (Manning et al., 2015). Competencies in multifaceted dimensions such as managerial skills, development, and behavior that interacted with each other and evaluated differently were considerations for identifying a successor (Manning et al., 2015). Additionally, Herzberg and Boone (2017) identified the dimension of core management skills for consideration in successor identification (Herzberg & Boone, 2017). In the absence of conveying a succession strategy, nonprofit personnel could not execute an appropriate succession due to an

occurrence of an unexpected incumbent departure nor support the organization's capacity for long-term sustainability (Santora et al., 2015). Fostering leadership development was a probable approach toward identifying and preparing a successor to ensure leadership continuity in the organization (Baker, 2017).

Leadership development. Leadership development was an intentional succession planning strategy in organizations (Gilliam et al., 2017). Continuing leadership development was a critical component of succession planning positioned to address imminent organizational leadership crises (Ballaro & Polk, 2017). A need to improve leadership depth including a cadre of well-developed emerging leaders poised for senior leadership positions, was a consistent concern in the nonprofit sector (Bozer, Kuna, & Santora, 2015). Actively engaging and understanding what potential or new leaders needed to perceive their new roles and responsibilities was how organizational members enhanced their leadership pipeline (Van Dusen, 2015). A nominalization of leadership development programs was that each candidate or leader involved would benefit from obtaining some strategic knowledge, skills, and abilities (Goldman, Scott, & Follman, 2015). Current leadership held the responsibility for developing future leaders (Van Dusen, 2015). Leadership development was successful when supported and committed to by experienced senior leadership. A multilevel approach to cascade the leadership agenda was essential for efficient development (Maheshwari & Yadav, 2018). Without the implementation of internal leadership development strategies in conjunction with succession planning processes in NPOs, leadership positions could have remained vacant (Bozer et al., 2015).

Leadership development commenced with the discovery of who the person wanted to be. Attention to individual identity and aspiration were imperative for learning outcomes (Maheshwari & Yadav, 2018; Soderhjelm, Larsson, Palm, Bjorklund, & Sandahl, 2018). Developing leader identity did not occur one-dimensionally; instead, it was a multifaceted process that included elements of identity development such as identifying interdependencies and discerning purpose (Zheng & Muir, 2015). Expansion of individual identity in developing leadership skills and expertise was crucial to the leadership development process (Soderhjelm et al., 2018). Maheshwari and Yadav (2018) expressed emerging leaders taking self-responsibility for their growth and seeking meaningful developmental opportunities such as mentoring produced prolific outcomes.

Mentoring was a means for identifying prospective leaders to advance to senior roles (Eliades et al., 2017). Mentoring aided emerging leaders in overcoming career challenges, taking control, and understanding the organizational environment (Saletnik, 2018). A mentoring relationship was a one-to-one relationship between a more experienced member (mentor) and a less experienced member (protégé) of the organization developed to promote the professional and personal growth of the protégé through coaching, support, and guidance (Niles et al., 2017). Mentoring impacted career achievement and job attitudes of proteges (Saletnik, 2018).

According to Eliades et al. (2017) mentoring strategies encompassed formal and informal career advancement opportunities that included identification of career aspirations, identifying and sharing opportunities for leadership development, constructing specific, measurable, attainable, relevant, and timely goals to build

leadership expertise, and conveying available resources and approaches with an experienced leader to orchestrate the efforts. Leaders held the responsibility of assigning mentors in the desired practice environments to foster achievement of career goals and succession planning (Webb, Jeffs, & Diamond-Wells, 2017). Formal mentoring of potential leaders demonstrating leadership qualities was essential to enable eventual replacement of experienced leaders (Webb et al., 2017). Through the mentoring experience, the future focus mentor achieved a balance that provided an essential combination of leadership skill development with social support. Thereby, the protégé had the opportunity to champion leadership development by aligning the cultivation of his or her interest and talents with organizational leadership opportunities to fulfill the leadership pipeline (Eliades et al., 2017).

In succession strategy, an emphasis was on whether an incoming leader (successor) propels strategic change or if changes in response to environmental demands surrounding the succession reshaped the leader to make changes (Ma, Seidl, & Guérard, 2015). The analysis involving whether to recruit internally or externally for a successor along with board involvement demonstrated relevancy to succession planning endeavors (Ma et al., 2015). Exploring the variations between an incumbent's and a successor's power and strategic perspective in the succession process was pertinent (Marcel, Cowen, & Ballinger, 2017). The literature on nonprofit and other industry leadership succession, irrespective of whether the succession was internal or external, indicated succession impacted the stability of the organization as well as its stakeholders (LeCounte et al., 2017).

Board effectiveness. Board effectiveness in nonprofit leadership succession was either problematic or contributed to a solution in planning for succession. Often board members did not have the expertise, time or resources to conduct the necessary succession planning activities, which constrained the succession process (Varhegyi & Jepsen, 2017). NPO governance is the responsibility of the board of directors (BOD; Olinske & Hellman, 2017). Role-performance relationship discord among board members tended to have substantial adverse effects on the efficacy of board governance which potentially inhibited succession planning (Bruni-Bossio, Story, & Garcea, 2016). NPO boards of directors experienced difficulty in prioritizing vital issues such as leadership succession or constructing optimal solutions during unstructured board meetings (Zhu, Wang, & Bart, 2016). Hence, the full board in conjunction with human resources necessitated participation in a structured platform such as a leader's retreat and think tanks that focused on emergency and long-term leader succession planning and talent development (Hooijberg & Lane, 2016; LeCounte et al., 2017). Formulating leadership development plans and executing strategic initiatives influenced the board's responsibility positively in ensuring the necessary structures and processes were in place to satisfy the organization's strategic needs (Hooijberg & Lane, 2016).

Age, organizational tenure, experience, and the incumbent leader's influence were facilitating factors of success in NPO leader succession planning (Schepker, Nyberg, Ulrich, & Wright, 2018). Incumbent leaders in many organizations took an active role in the succession process including guidance and mentoring; however, this can become disruptive if the leader was the founder of the organization (Woodfield, Shepherd, &

Woods, 2017). At large, scholars asserted NPO founders believed they still had a voice and influence in operations after the appointment of a successor, which was not only strategically wrong but also disruptive (Santora et al., 2014). Founders who attempted to remain influential in the organization inhibited the effectiveness of their successors (Santora et al., 2014). Nonprofit board members had an obligation to ensure a successful succession. In fact, Varhegyi and Jepsen (2017) determined board members are intricate role players in setting the strategic direction for the organization and their effectiveness improved through prioritizing succession planning, selecting a suitable leader, and creating ethical standards.

Ethics and succession planning. Business ethics is a relevant consideration in leadership development and succession planning strategies. Ewest (2018) noted organizational management endured challenges due to neglecting leadership development and ethical leadership behaviors which impacted succession planning. The authors found a positive association between the mentioned factors and purported that organizational management that focus on succession planning, leadership development, ethics, and performance improvement experience success. Selecting a leader based upon performance through a comprehensive succession plan was not enough because of unethical performance indicators (Kim, Kang, Lee, & McLean, 2016). Organizational leaders needed to also choose ethical leaders given the influence that ethics had on the organization culture. Kim et al. (2016) posited assessing the culture for moral dissonance by leaders was necessary to facilitate leader development and leader retention. Ewest

(2018) asserted leaders used succession planning as a quality management process and succession supported the fostering of ethical values.

Members of the multigenerational workforce illustrated distinctive ethical values (Pekerti & Arli, 2017). Generational markers influenced their moral ideology and behaviors (Pekerti & Arli, 2017). Researchers conducting comparative scholarship of the multigenerational workforce dynamics revealed, boomers concerned themselves with organizational citizenship, and Generation Y also known as millennials desired work that they felt they owned knowing they were making a difference being civically engaged (Karthikeyan, 2017). Millennials espoused lower altruistic values than their forbearers (Chen & Lian, 2015). Arli and Pekerti (2016) posed millennials were ethical relativists possessing situational ethical principles. Millennial's distinct ethical attitudes and behaviors are restructuring the organizational culture, precisely regarding business ethics (Chen & Lian, 2015). Passing the leadership baton to a millennial cohort presented ethical inferences. Because millennials play significant roles in the future of organizations, leaders must understand the uniqueness of this cohort (Culiberg & Mihelič, 2016).

Nonprofit Organizations (NPOs)

A nonprofit is an incorporated entity operating in the third sector that has financial and operational concerns like public and private organizations; however, the NPO's purpose originates through fulfilling a social mission rather than gaining profits (Agarwal et al., 2017). Nonprofits do not aim to maximize shareholder value. Instead, nonprofits pursue multiple bottom lines linked to the achievement of the organizational

mission and social goals to satisfy its various stakeholders (Maier, Meyer, & Steinbereithner, 2016). A nonprofit is the underpinning of this study and specifically an educational organization that fulfills the social needs of underrepresented populations through educational and other social services. Leadership roles and responsibilities, along with an NPO's performance measurements are vital to understanding leadership succession (Bish & Becker, 2016). NPOs have become more business-like (Maier et al., 2016). NPO personnel constructed strategic human resources procedures to overcome external and internal challenges in financial resources and challenges in asserting the organization's values and mission fulfillment (Laurett & Ferreira, 2018).

Evaluating NPO performance must embrace the mission fulfillment factor. Espousing for-profit and private sector practices encountered disapproval in a nonprofit environment (Maier et al., 2016). Conceivably because of being a founder of an NPO, limited NPO leaders performed systematized organizational needs analysis (Liket & Maas, 2015). A lack of professionalization hindered succession endeavors in many NPOs (Maier et al., 2016). Several did not partner with other organizations in the sector, and ultimately did not sustain (Terrana, 2017).

Performance measurement in social enterprises occurred distinctively through assessing the multidimensional factors of financial performance (e.g., cost of resources for rendered services), social effectiveness factors (fairness, involvement, and transparency), and institutional legitimacy factors (mission fulfillment and credibility) (Arena, Azzone, & Bengo, 2015). Measuring for performance led to higher effectiveness (Wright, 2017). Accountability and transparency were essential performance

measurements to substantiate an educational organization capacity (Prentice & Brudney, 2018). Organization capacity facilitated how programs and services became offered (Lee & Nowell, 2015). In educational organizations like nonprofit academic centers, community engagement constituted a sustainability dimension for assessment to improve performance and mission fulfillment (Prentice & Brudney, 2018). Stakeholders demand transparency and accountability from NPOs concerning sustainability performance (Maniora, 2018). In NPO performance management, stewardship and performance exhibited innate pressure amid financial responsibility and sustaining the organization's social mission (Lee & Nowell, 2015).

Scholars contended that nonprofit organizations are operating in a market-driven environment and volunteers are essential to attaining market-driven objectives (Agarwal et al., 2018). Nonprofit institutes varied from for-profit institutes. Nevertheless, human resource strategies integrating high-performance work practices for example, recruiting and retention actions demonstrate nonprofit institutions' adaptableness to for-profit institution's strategies for human resources (Robineau, Ohana, & Swaton, 2015). High-performance work practices stemmed from training and development, employee and retention (Robineau et al., 2015). Contributing to insufficiencies in professional development, few nonprofit founders are performing systematic evaluations (Terrana, 2017). Enhancing professional procedures supports nonprofits in market competition throughout difficult economic conditions (Robineau et al., 2015). Leaders of nonprofits devise human resource strategies to address external environmental difficulties, such as funding and competition, along with internal problems of mission and values (Laurett &

Ferreira, 2018). In leading NPOs, leaders should balance organizational management and motives effectively.

Leadership is a key driver of an NPO, and throughout the literature, nonprofit leadership comprises diverse styles of leadership and practices such as innovative leadership, which impacts organizational performance (Zavadsky, 2016). Competition with for-profit providers and availability of funding affect NPO commercialization (Maier et al., 2016). NPO leaders responded to tension between their social mission and their strategies to acquire financial resources (Ogliastri, Jäger, & Prado, 2016). Leaders must stay well-informed of competitive business practices to change and innovate for long-term survival (Choi, 2016). Skills, knowledge, and establishing organizational culture were a leader's positive influence on innovative behaviors in a rapidly changing NPO environment (Choi, 2016). Cultivating stakeholder relationships was imperative to successful innovative strategies (Zavadsky, 2016). The tenure of nonprofit leaders is a representation of attitudes on how leaders practice innovative behaviors (Bernstein, Buse, & Bilimoria, 2016). Bernstein et al. (2016) posited early in a nonprofit leader's tenure they are likely to have a liberal attitude toward innovative change. In the growth of tenure, leader's attitudes toward change becomes more conservative. However, Conte (2018) purported long-tenured leaders are more active in innovational strategies compared to short-tenured leaders and tenure affects leadership continuity. Leadership in the work environment influenced an organization's climate stronger than innovation (Hughes, Lee, Newman, & Legood, 2018).

Leadership in nonprofits is a process of influence that constructs organizational development and influences organizational performance (Kearns et al., 2015) and innovation (Bish & Becker, 2016). Hence leadership qualities and styles of nonprofit leaders differ according to position (Kearns et al., 2015), tenure (Conte , 2018), commitment, and task (Bish & Becker, 2016). The leadership type implemented is representative of an organization's mission. For example, in a nonprofit advocacy organization, the leader necessitated special knowledge and skills directly related to task and mission accomplishment.

The NPO leaders' skills encompassed management skills, ability to build strong relationships, and planning skills (Wright, 2017). Kearns et al. (2015) identified various effective leadership skills for leaders operating in distinct mission oriented NPOs to carry out their tasks and roles, which included technical skills, human skills including mediating with volunteers, and conceptual skills (Kearns et al., 2015). NPO leadership involves expansive tasks beyond the for-profit sector of profit maximization that embrace achieving their social mission. In NPO performance, a leaders' commitment, innovation, and knowledge were vital components to be competitive and to ensure global adaptation and innovation (Bish & Becker, 2016). Nonprofit leader's innovative behaviors benefited the organization (Choi, 2016) and leadership tenure impacted those behaviors (Conte, 2018).

NPOs endured distinctive operational problems. Distinctly, due to organizational missions and the management and reliance on volunteers (Bish & Becker, 2016). Servant leadership is present in a variety of organizations including nonprofit organizations

(Palumbo, 2016). Inherently servant leaders embodied a willingness to empower and develop their followers such as volunteers, which are key characteristics of servant leadership. However, in NPOs, servant leadership is just one style of effective leadership (Palumbo, 2016). A leader's motives influence his or her attitudes and behaviors. When leaders executed organizational change and sustainability initiatives, the perception of their motives impacted stakeholder engagement (Li, Wu, Johnson, & Avey, 2017). A leader who illustrated complete devotion to the organization did not fully focus on the growth of the followers, as necessitated by the servant leadership style (Palumbo, 2016). When followers perceived that leader's changes were not beneficial for the greater good because a leader acted manipulatively to achieve egocentric personal goals, stakeholder engagement diminished (Li et al., 2017). Appelbaum, Degbe, MacDonald, and Nguyen-Quang (2015) posed leaders can positively impact volunteers' behaviors to support changes by influencing their attitudes through enhancing his or her perceived benefits of change. To avoid change resistance, leaders fared better by suspending change initiative implementation until a positive work climate became apparent (Appelbaum et al., 2015).

Cai, Loon, and Wong (2018) determined individuals who use a transformational leadership style demonstrated greater effectiveness than those using a transactional leadership style on workgroup climates and change processes in educational-based NPOs. Transformational leaders not only impacted the change process but facilitated the process also through their interactive leadership style and fostered a trusting climate. To be effective in adapting to varying circumstances, nonprofit leaders might engage in a combination of transformational and transactional leadership practices (Cai et al., 2018).

Transactional leadership is an involving approach, and transformational leadership is a motivating and inspiring leadership approach (Cai et al., 2018). NPO leaders collaborated with other organizations including NPOs and for-profit agencies (Armsworth et al., 2015; Chapman & Varda, 2016). For example, public agencies acted as partners to conservation nonprofits through providing grants and collaborating on specific activities (Armsworth et al., 2015). NPO leaders using a cross-sector collaboration solved complexed social problems (Chapman & Varda, 2017).

Leaders collaborating in NPOs necessitated distinctive leader characteristics. A nonprofit leaders' commitment to organizational mission and flexibility propelled community partnering (Chapman & Varda, 2017). A nonprofit leader needs to create networks (Armsworth et al., 2015) furthermore, at the start of leadership tenure, the leader should innovate (Bernstein et al., 2016). In propelling community partnerships, collaborative leadership skills encompass embracing an inclusive shared leadership style, and a capacity in promoting trust and relationships (Amagoh, 2015).

Generational Cohorts

A generational cohort is a comparable group of individuals who share birth years, age, values, and experiences yet in contrast to other individuals born in different periods, they differ (Chaney, 2017). Generational cohorts' characteristics vary throughout regions and cultures; however, academic scholars explicated standard descriptions for each generational group (Dwyer & Azevedo, 2016; Moore, Grunberg, & Krause, 2015). The generational cohort differences that leaders found challenging include attitudes, beliefs, values, work ethics, and workplace perceptions (Moore et al., 2015). Generational

cohorts shared characteristics in work attitudes and practices thereby understanding generational differences is essential in human resource management (Dwyer & Azevedo, 2016; Rani & Samuel, 2016).

Younger cohorts in the work environment are pertinent to the succession conversation because the individuals who will replace boomer leaders will understandably be a member of a younger group (Lambert, Marks, Elliott, & Anderson, 2015; Martin & Warshawsky, 2017). Researchers addressed the multigenerational workforce and focused on boomers exiting their current roles, as well as work trends, and the need to recruit and retain younger cohorts as successors (Lambert et al., 2015; Martin & Warshawsky, 2017). Understanding the values, beliefs, and attitudes of Generation X and Generation Y empower boomer leaders in passing the leadership baton. Furthermore, younger cohort's values influence organizations in recruiting, learning and development, and retaining younger volunteers (Ng & Parry, 2016).

Retirement of boomer generation. Boomers retirement trends are moving upward (Auerbach, Buethaus, & Staiger, 2015; Martin, 2015). The current and impending retirement of boomers is visible worldwide in diverse fields such as engineering (Pilotte, Bairaktarova, & Evangelou, 2015) and financial management (Ferguson & Morton-Huddleston, 2016). Visibility of current and retirement trends are also in diverse industries such as construction (Perrenoud & Sullivan, 2017) and healthcare (Auerbach et al., 2015; Martin, 2015) industries. Also, the trend extends to diverse organizational systems such as educational (Peters-Hawkins et al., 2018) private, government, and NPOs (McKee & Froehlich, 2016; Perrenoud & Sullivan, 2017; Reichenberg, 2015). For

example, in education, vacancies in school administration will continue to increase as current leaders retire (Peters-Hawkins et al., 2018). Furthermore, a Bureau of Labor Statistics report indicated that the federal government, with a cadre of over 43% of employees above the age of 50, will become significantly impacted by the exodus of baby boomers from the workplace (Reichenberg, 2015). Notwithstanding of organization size, location, or industry classification (Martin, 2015), the boomer retirement trend continues to move upward.

Amid the boomer's cohort, retirement attitudes differ (Davies, Van Der Heijden, & Flynn, 2017; Houlfort et al., 2015). The state of work was comparable to the state of retirement (Davies et al., 2017). Expectedly, boomers with high job satisfaction had a negative attitude to retirement as retiring meant surrendering a source of positive well-being (Houlfort et al., 2015). Similarly, a person with lower job satisfaction expectedly had a positive attitude toward retirement because retirement facilitated the conclusion of an unrewarding job (Davies et al., 2017). Though some boomers had a preference on when to retire, many delayed retirements because of different aspects such as levels of education and physical exertion, lower pension benefits, and personal retirement revenue (Auerbach et al., 2015; Ferguson & Morton-Huddleston, 2016). An additional aspect delaying boomer's retirement was identifying a successor (Marcel et al., 2017). Other concerns developed regarding the loss of experience or tacit knowledge (Perrenoud & Sullivan, 2017).

The multigenerational workforce. The multigenerational workforce comprises three prominent diverse generations of volunteers including baby boomers (boomers,

born between 1946 and 1965), Generation X (Gen X, born between 1966-1979), and Generation Y (Gen Y also known as millennials, born between 1980-1995; Devaney, 2015; Woods, 2016). The workforce composition is rapidly shifting as millennials are quickly outnumbering boomers in the workplace (Woods, 2016). The workforce shifted from approximately half boomers in 2005 to approximately a third in 2015. Generation Y outnumbered members of Generation X in population by nearly 12 million and surpassed the percentage of boomers and Gen X employees (Woods, 2016). The population imbalance is substantial and warrants the focus placed on comparing boomers and Gen Y throughout the scholarly literature as well as the minimum representation of Gen X in the succession literature (Graybill, 2014). Gen X employees may be successors to boomer leaders, though considering the population imbalance and Graybill (2014) the mass exodus of boomers from the workforce, the realization that Gen Y, not Gen X employees, will have to fill the void of boomer leadership positions.

Multiple researchers explored, the characteristics of the boomer and Gen Y cohorts, which depicted differentiations and similarities (Chen & Lian, 2015; Moore et al., 2015). The boomer and Gen Y cohorts shared significant similarities in levels of education, parenting experiences, technology impact, commitment to employers, and continuous learning (Nnamboozee & Parumasur, 2016). Regarding the boomer, Gen X and Gen Y cohorts, Nnamboozee and Parumasur (2016) posed distinct similarities among the cohort groups including career advancement, work environment, and rewards. Nnamboozee and Parumasur along with Moore et al. (2015) further illustrated distinct differences relating to a climate of diversity, and frequent recognition and feedback amid

Gen Y and the two older groups. Volunteers of the boomer and Gen X groups anticipated advancement opportunities, arrived in a more diverse workforce compared to past generations, and required additional feedback and recognition in the work environment.

The boomer and Gen Y cohorts embraced various commonalities that were not in alliance with the cohorts of Gen X. In education, boomers and millennials were the most educated generations when entering the work environment, and boomers learned through their experiences (Nnamboozee & Parumasur, 2016). The parental experiences of each generation impacted behaviors in their respective cohorts (Moore et al., 2015). Boomers' life experiences signified proclivities toward respecting authoritarian structures (Rani & Samuel, 2016). The life experiences of Gen Y demonstrated extraordinary parental attention (Moore et al., 2015). Contrasting, Gen X became more independent and self-reliant because of compulsive working parents (Rani & Samuel, 2016). At large, the primary family experiences of Gen Y shaped their tendencies for teamwork and collaboration in work settings (Moore et al., 2015) whereas, Gen X employees preferred autonomy and experienced professional success when functioning autonomously in work settings (Ng & Parry, 2016).

Technology impacted the values of each cohort (Ng, & Parry, 2016). Boomer cohorts recognized as technology immigrants became impacted through television and viewing the world from their living rooms, along with computer availability in the workplace (Venter, 2017). Generation Y dependency on technology in the workplace presented challenges for boomer trainers who perceived technology vastly different (Venter, 2017). Both boomers and Gen X members' resistance to technology were not

apparent. Nevertheless, they perceived the use of work-related technology outside of working hours intrusive (Devaney, 2015). Gen Y underwent similar technological advances, became known as digital natives, and Gen Y are reliant on technology daily (Devaney, 2015; Ng & Parry, 2016). Members of Gen X grew up with access to technology, yet like many boomers some Gen X members arrived online later in life (Devaney, 2015). Gen Y embodied an early adoption in using technology because technology was always a fundamental part of their life experiences (Devaney, 2015). Gen Y employees preferred digital communications and mobile work designs (Nnamboozee & Parumasur, 2016). From increasing understanding of generational differences, designing flexible work arrangements to accommodating virtual collaborative processes, human resource managers need to respond to the shifting workforce through recruitment and training (Dwyer & Azevedo, 2016).

In contrast to the perceptions of boomers, Gen X and Gen Y value work-life balance (Gilley, Waddell, Hall, Jackson, & Gilley, 2015; Nnamboozee & Parumasur, 2016). In fact, Gen Y volunteers conveyed that their perceptions of work-life balance vary from their boomer leaders (Gilley et al., 2015). Members of both younger generations placed value on leisure (Gilley et al., 2015). Although commitment to the organization exists, the younger two cohorts will not forsake their personal lives for work (Nnamboozee & Parumasur, 2016). Gen Y workers function in virtual and mobile work environments with lack employer loyalty, and the desire for personal preference accommodations (Nnamboozee & Parumasur, 2016). Gen X workers embodied skepticism of authority and favored a flexible work environment (Ng & Parry, 2016). The 21st-

century work environment defined by generational transformation should reflect an environment that tapers according to the various generational cohorts (Nnambooze & Parumasur, 2016).

Gen Y and Gen X volunteers perceived organizational training and development activities as indicators of the organization's concern and care for its workforce (Nnambooze & Parumasur, 2016). Boomers endured more engagement because of enhanced organization commitment and development activities (Nnambooze & Parumasur, 2016). There is a need to provide engagement opportunities for the next generation of leaders (Nnambooze & Parumasur, 2016). Mentoring was a strategy suggested by researchers to address succession in multigenerational work environments (Manning et al., 2015). Mentoring have an essential utility in cultivating the next generation of leaders through knowledge transfer, learning skills, and institutional knowledge (Manning et al., 2015). Mentorship and succession plans function concurrently thus an emerging leader should continuously pursue influence from various sources (Kennedy, 2015). Innovative mentoring strategies such as reverse mentoring has no relevancy to seniority. In reverse mentoring, a younger cohort serves as a mentor to an older cohort promoting engagement through knowledge sharing and cultivating leadership skills (Nolan, 2015). Whether young or old, age was an influential factor in organizational training (Madichi & Nyakang'o, 2016). Different modes of delivering training was necessary to accommodate the different cohorts learning styles (Dwyer & Azevedo, 2016; Madichi & Nyakang'o, 2016). Understanding the work values of each cohort is essential to leading a multigenerational workforce successfully (Dwyer &

Azevedo, 2016; Ng & Parry, 2016). To efficiently manage different cohorts, effective leaders were to acknowledge generational differences and consider the diverse values amid each (Gilley et al., 2015; Karthikeyan, 2017; Martin & Warshawsky, 2017) and blend distinctive, creative leadership styles to accommodate the variation in values (Lewis & Wescott, 2017). While similarities and differences exist among older and younger cohorts (Dwyer & Azevedo, 2016) assertions by multiple researchers throughout the literature indicate younger cohorts, specifically millennials, will profoundly impact leadership styles and actions in organizations (Solaja & Ogunola, 2016).

Gen Y detailed profile illustrated high values on multiculturalism and diversity along with lifelong technology comfortability and access (Karthikeyan, 2017). The multigenerational workforce was not the sole factor to identify, train, and retain critical organizational leaders. Leaders and human resource practitioners possessing insight into various cultural backgrounds mutually with different generational preferences proved advantageous in attracting and retaining the right volunteers (Nolan, 2015). Academic scholars asserted leaders and human resource practitioners should emphasize understanding diverse volunteers and their high impact on business operations and strive to build recruitment and retention strategies to attract and retain talent (Dwyer & Azevedo, 2016; Nolan, 2015).

Multicultural Leadership Considerations

Strategies for succession planning may parallel with challenges of an area's multicultural composition that may relate to a leaders' ethnicity (Gilbert, 2017). Ethnicity may be a factor that creates opportunity for an individual or represent a potential barrier

for others (Bozer et al., 2017). Present-day leaders require strategies to not only address generational differences but cultural ones as well. Diversity is not just cultural but generational also due to multiple generational volunteers in the workforce (Miranda & Allen, 2017). The ethnic landscape of the total population of almost 3 million people in the research area, comprises 77.6% White, 24.9% Hispanic or Latino, and 16.8% African American (U.S. Census, 2017). The research area county comprises a total population above 1 million people and includes 71.3% White, 24.9% Hispanic or Latino, and 18.1% African American (U.S. Census, 2017).

The capacity of a leader to integrate into an organization and community with a multicultural populace such as the research area might propose relevant considerations in planning for succession. The three stages of acceptance, adaptation, and integration were essential leader competencies in integrating cultural values and behaviors (Cushner & Chang, 2015). Multicultural work behaviors attained influence from individual worldviews (Hong & Cheon, 2017). A leaders' cross-cultural competence may improve in the behavioral domain, by developing communication skills such as listening and responding (Cushner & Chang, 2015). Cross-cultural competent leaders reflected flexibility in accepting and adapting perspectives and behaviors as well as communicating effectively with others whose language, ways of thinking and interacting were different from their own (Cushner & Chang, 2015).

Relocating to a different culture to work caused negative experiences by members of the host culture (Kaelberer, 2017). A positive dynamic multicultural leadership process involved leaders building knowledge of other cultures and gaining insight into cross-

cultural life experiences, which provided an understanding of culture, values, and practices (Smolcic & Katunich, 2017). Cultural intelligence supported improved cultural awareness and behaviors in cross-cultural interaction (Smolcic & Katunich, 2017). Furthermore, a best practice was adapting global diversity and inclusion strategies and programs to the country or region (Steele & Derven, 2015). Leaders cross-cultural work experiences produced new perspectives and ideas, which facilitated an inclusive culture (Steele & Derven, 2015).

Leadership Transition

In organizations, a change in leadership is significant (Dalpiaz et al., 2017). A boomer leader's sudden departure is a distressing occurrence impacting personnel behaviors, organizational processes, and organizational sustainability (Vivian & Hormann, 2015). Prevailing challenges exist for SLs and new leaders. New leaders may present a difficult adjustment for the firm and reflect negatively on organizational performance (Stewart, 2017). New leaders succeeding skilled boomer leaders necessitated more organizational support, and development (Boyal & Hewison, 2016). High investment in grooming new leaders led to competent leaders who fostered a thriving organizational culture (Van Dusen, 2015).

A leader's transition, which affects an organization's culture was a disruptive period for the organization (Stewart, 2017). A senior leader, such as a NPO executive director holds immense responsibility for implementing strategic change initiatives (Olinske & Hellman, 2017). The fallout of executive turnover can be costly regarding disrupted operations and a senior leader transition-related expenses (Stewart & Diebold,

2017), and expose the organization to increased uncertainty (Marcel et al., 2017).

Furthermore, the transition can encompass damaging impacts on a leader. Effective leaders facilitated more excellent performance in the organization. Poorly performing leaders aided more executive turnover (Stewart & Diebold, 2017).

In the sensemaking process, a leader's identity is vital because meanings materialize that influence identity and behaviors (Hammond, Clapp-Smith, & Palanski, 2017). Sensemaking processes for a transitioning leader to a new role of leadership endured barriers such as a lack of organizational support and insufficient time for thinking and reflection (Hammond et al., 2017). A nonprofit leader's burnout possibly stemmed from a conflict amid personal identity and role identity (Regan, 2016). For example, satisfying a charitable mission such as serving poor people conflicted with dressing up speaking with wealthy people while attending fundraising functions (Regan, 2016). Acknowledging that conflicts may exist, and the loss of a reference or belonging group was necessary to support personal identity through a transition, organizations provided education and training for a smoother transition (Regan, 2016). When leaders used similar skills across organizational domains, they perceived cross-domain connections (Hammond et al., 2017). Mentoring activities amid successors and incumbents were strategies for effective leadership transition (Massingham, 2018). Mentoring resulted in attaining and retaining tacit knowledge that provided long-term benefits in organizational succession planning (Massingham, 2018). Leadership succession planning was a deliberate process undertaken to ensure a smooth transition (Peters-Hawkins et al., 2018). Researchers exploring the nonprofit sector conveyed a

substantial absence of succession planning activities (McKee & Froelich, 2016; Santora & Gil, 2015).

Transition

The current body of literature on nonprofit succession planning strategies differed. Scholars who explored succession planning in the nonprofit sector offered leaders evidence for constructing succession strategies. Exploration of the research phenomenon was through the conceptual framework of knowledge transfer. The review of professional and academic literature incorporated articles related to the conceptual framework, succession planning, and NPOs incorporating performance, leadership, and sustainability. Furthermore, the literature review included articles relating to generational cohorts, including work trends of boomers, the multigenerational workforce, and considerations for multicultural leadership. The topic of leadership transition concluded the review.

In Section 2, I will provide a comprehensive explanation of the role of the researcher, participants, the research methodology and design, the central research population and sampling, ethical research, data collection instruments and techniques used in the research study. Also, I will incorporate details on data collection and organization techniques, data analysis procedures, reliability, and validity. In Section 3, I will include a comprehensive summary of the research conducted for the DBA Consulting Capstone.

To conduct in-depth research for and about the assigned client organization, I used the 2017-2018 Baldrige Performance Excellence Framework and its Criteria for

Performance Excellence to help ensure a holistic, systems-based evaluation of XYZ Company. My use of an integrated, systems-based approach facilitated the exploration of the following key management and leadership areas: leadership; strategy; customers; measurement, analysis, and KM; workforce; operations; and results. Finally, Section 4 will comprise findings from this study, an executive summary of key themes, a summary of the project, as well as contributions and recommendations for future research.

Section 2: The Project

Ascertaining and exploring the succession planning strategies nonprofit leaders use was the foundational purpose of this study of the phenomenon of succession planning. In this section, I will discuss my role as the researcher in the data collection process and provide a comprehensive discussion of the eligibility criteria employed for selecting the participants who could provide insight into the research question. This section will also include an in-depth discussion of the research methodology and design, the population sampling used to study the foundation and creation of nonprofit succession planning strategies, and measures to substantiate ethical protections for participants. Section 2 will conclude with the details of the data collection tools, data collection and data organization methods, data analysis methods, and the approaches to ensure the validity and reliability of the results of the study.

Purpose Statement

The purpose of this qualitative single-case study was to explore strategies nonprofit leaders use to develop succession plans. The targeted population comprised three leaders of a NPO located in the southeastern United States who had implemented succession planning strategies. The implications for positive social change include the potential to provide insights to nonprofit leaders on strategies to develop succession plans, which may enable nonprofit leaders to sustain their mission of serving communities.

Role of the Researcher

In qualitative research, researchers serve as a key instrument in collecting and confirming data (Kornbluh, 2015). To enhance the reliability of the research design as well as the validity of the results, researchers should explain their role in the research process and follow a plan of inquiry (Sanjari et al., 2014). In navigating the research for this qualitative single-case study, I became the primary instrument for collecting data. My connection with the topic of nonprofit leaders' lack of developing strategies for succession planning was an indirect one. In previous professional roles in for-profit organizations, I had direct experience with leaders neglecting to construct and implement succession plans, which impacted their business processes.

As the researcher, adhering to the ethical principles of the *Belmont Report* was imperative. Throughout the research process, I observed the guiding principles of the *Belmont Report* of respect for persons, beneficences, and justice for human participants (Friesen, Kearns, Redman, & Caplan, 2017). The participants in this study signed a form of consent and voluntarily participated in the study. I treated each study participant ethically as well as adhered to Walden's University's IRB requirements and followed the preapproved data collection procedures described in the Manual for the DBA Consulting Capstone. Researchers must attain IRB approval before gathering any data for a study (Walden, 2017).

Researchers use various techniques, such as interviews, observations, electronic and organizational documents, to amass qualitative data for their study (Chenail, 2011). One of the data collection techniques I used for this study was semistructured interviews.

Seidman (2015) stated the fundamental purpose of qualitative interviewing is not to evaluate but to develop an in-depth understanding through the interviewee's unique perspective or experience relating to a specific issue.

Chenail (2011) emphasized although using the semistructured interviewing technique to gain data in a qualitative exploration is common, challenges do surface for researchers in managing bias. Mitigating prejudice and avoidance of viewing data through a personal lens are vital to achieving the trustworthiness criteria that includes credibility, dependability, confirmability, and transferability (Schwandt, Lincoln, & Guba, 2007). Although avoiding all bias is difficult, the researcher mitigating bias to the best of their ability is a necessity. Using triangulation, data saturation, peer debriefing, and member checking helped me mitigate bias throughout the process of collecting and analyzing data (see Yin, 2018). Furthermore, implementing an interview protocol (see Appendix) helped to follow the criteria, manage the interview process, diminish bias, and achieve greater insight into participants' perspectives or practices (see Castillo-Montoya, 2016).

Participants

Walden University administrators and faculty designated and vetted the client organization for my DBA Consulting Capstone experience. My research consulting capstone project consisted of a purposeful sample of three participants who served in executive leadership roles in a nonprofit student service organization located in the southeastern United States. My rationale for selecting the participants was that they embodied knowledge of organizational strategies that supported essential business

objectives with leadership succession planning. Cronin (2014) purported the participants' selection standards should align with the research question because their voice is vital to the study.

Raheim et al. (2016) stated acquiring access to the participants in a study through relationships is essential for a researcher. Houghton, Casey, Shaw, and Murphy (2013) suggested that a researcher employ ethical procedures to develop and sustain relationships with the participants through honesty and community partnerships. Additionally, constant communication is essential because it is a form of ethical care (Grady, 2015).

Research Method and Design

Research Method

Alignment of the research method (i.e., qualitative, quantitative, or mixed methods) helps the researcher in determining the course in which to inquire about a phenomenon (Hlady-Rispal & Jouison-Laffitte, 2014; Starr, 2014). Researchers using the qualitative method reflect on people, experiences, and perceptions within a real-life setting and seek to answer *what*, *why*, and *how* questions instead of how often or how many (Mukhopadhyay & Gupta, 2014; Runfola, Perna, Baraldi, & Gregori, 2016). Mukhopadhyay and Gupta (2014) acknowledged qualitative research occurs in real-world environments and embraces exploring the meaning of the participants' experiences by using multiple data sources that include interviews. When conducting interviews to collect data, my intent was for the participants to reconstruct their experiences relevant to the research question of the study (see Cleary, Horsfall, & Hayter, 2014). Therefore, I

used the qualitative method to attain comprehensive data that would be difficult to quantify, such as experiences and perceptions, when I explored strategies nonprofit leaders use to develop succession plans.

Quantitative researchers concentrate on experimentations, analysis, and testing hypotheses to examine relationships or differences among variables (Kozlowski et al., 2013). Formulating and testing hypotheses for examining relationships or differences among variables was not the intent of this study. Starr (2014) posited in qualitative studies, collected data are in the form of words, whereas in quantitative studies, collected data are numerical or statistical. In contrast to quantitative researchers, qualitative researchers consider the context of the research information (Mukhopadhyay & Gupta, 2014). Exploring data analysis and not people is a hallmark for quantitative researchers (Runfola et al., 2017). A quantitative research exploration did not align with the intent of this study because it would have been difficult for me to examine ideas and themes of the phenomenon as well as acquire an understanding of the participants' experiences in succession planning.

Using the mixed method allows the researcher to take a back-and-forth approach to qualitative and quantitative methodologies (Green et al., 2015). Mixed method researchers merge qualitative and quantitative data to explore and understand a complex phenomenon in detail, and generally, they approach a research problem through numerous philosophical paradigms in one study (Halcomb & Hickman, 2015). Although using the mixed method approach may be beneficial, the choice to implement a research design depends on the research question (Starr, 2014). Morse and Cheek (2014)

purported in most mixed method studies, quantitative aspects are commonly the core components and the qualitative aspects are secondary. I did not propose to integrate qualitative and quantitative elements in the same study or merge the results to answer the research question; therefore, the mixed-method approach was not appropriate for this study.

Research Design

Qualitative research designs include case study, ethnography, and phenomenology (Yin, 2018). Researchers use case study design to capture the circumstances and condition of a real-life phenomenon within its environmental context (Ridder, 2017). The case study research design enables researchers to explore defined groups or specific areas or business processes (Starr, 2014). The flexibility of the case study design supports researchers in acquiring holistic and in-depth characteristics of individuals, organizations, or programs through multiple data sources (Cronin, 2014; Yin, 2018). Using the single-case study design was appropriate for this study because I became empowered in understanding organizational processes and acquired new knowledge while exploring the breadth and depth of the phenomena through interviews, documents, and reports.

Ethnography is an ongoing developing learning process and not a rigid researcher-controlled study (Marion, Eddleston, Friar, & Deeds, 2015). Ethnographic researchers conduct extensive and exhaustive studies that address human experiences and behaviors within a natural setting (Dawson, 2014). Researchers using ethnography to investigate the shared patterns within cultural groups by engaging with the participants using interviews and observations (Starr, 2014). The intent of ethnographic research is for

researchers to analyze an understudied culture along with the significant event impacting the studied culture (Gooberman-Hill, 2015; Marion et al., 2015). A study using the ethnographic design was not suitable because the objective of this study was to focus on succession planning strategies that nonprofit leaders use, not a cultural group's shared patterns.

Researchers who explore the lived experiences of people about a phenomenon depicted by them, use the phenomenological design (Yin, 2018). Corby, Taggart, and Cousins (2015) affirmed phenomenological research is significant because it contributes value to a person's experiences and perspectives. When using the phenomenological design, the researcher inherently relies on participants' descriptions of their experiences (Corby et al., 2015). Therefore, the participants become the reliable source of information, and the primary data collection instrument is the interview (Bevan, 2015; Corby et al., 2015). The phenomenological approach was not suitable for this study because I did not describe the participants' lived experiences.

Qualitative researchers use open-ended inquiries to obtain the perspectives and experiences of participants regarding a phenomenon (Marshall & Rossman, 2016). I asked open-ended inquiries in semistructured interviews to better understand the perspective of the participants (see Baškarada, 2014). Marshall, Cardon, Poddar, and Fontenot (2013) determined that sample size in qualitative research directly relates to data saturation. Marshall et al. furthered emphasized qualitative sample sizes must be large enough to uncover the sample population's relative perceptions. To achieve data saturation and ensure the content validity of this qualitative study, I continued the

interview process of three nonprofit executive leaders and data collection until no new substantial information existed relating to the research question. Fusch and Ness (2015) posed that researchers achieve data saturation when no new information emerges from the data. Achieving data saturation helped to answer my research question on strategies nonprofit executive leaders use to plan for succession.

Population and Sampling

Sampling is a practice of amassing information in its entirety instead of measuring every unit of the population (Davoudi, Nayeri, Raiesifar, Poortaghi, & Ahmadian, 2016). In this qualitative study, I purposefully sampled three executive nonprofit leaders in the southeastern United States who had demonstrated knowledge in succession planning. Researchers using the purposeful sampling technique select participants with a specific criterion (Etikan, Musa, & Alkassim, 2016). Palinkas et al. (2015) reported qualitative researchers implement purposeful sampling to select participants based on their knowledge and experience of the research topic who provide descriptive and valid information for gaining an understanding about the research topic.

Qualitative researchers do not select participants to represent the population distribution but a sample of the population to provide a unique vision for the phenomenon (Davoudi et al., 2016). I did not confer with entire populations; therefore, I assessed a sample size of three participants who were executive leaders in a NPO located in the southeastern United States who had established succession plans. Participant sample sizes in qualitative case studies are smaller in contrast to participant sample sizes in quantitative case studies because qualitative research is about meaning and quantitative

research is about devising generalized hypothesis statements (Davoudi et al., 2016). Queirós, Faria, and Almeida (2017) purported in case studies, the sample size is essential to acquiring detailed information for the analysis and gaining an understanding of a complex event. Yin (2018) asserted a sample of three to eight participants in a case study is suitable for amassing enough data necessary to understand the phenomenon's context.

Adhering to the procedure of the DBA Consulting Capstone, Walden University administrators and faculty assigned an approved client organization to me. Typically, the researcher stipulates the criteria for inclusion or exclusion when establishing the sample of the study (Robinson, 2014). The criteria I used to select participants for this study included leaders who functioned at the SL level in the designated NPO located in the southeastern United States and who possessed knowledge in developing and implementing succession plans.

Conducting semistructured in-depth interviews advance collecting rich descriptive succession planning data (Starr, 2014). Semistructured interviews provide researchers the flexibility to probe participants for details of their experiences (Seidman, 2015). The selected leaders provided responses to semistructured interview questions via phone. Conducting phone interviews encourages participants to speak freely (Farooq & de Villiers, 2017). The participants' geographical location, juxtaposed to mine, created a challenge to conduct face-to-face interviews. Therefore, I interviewed the participants from a private home office to safeguard their privacy.

The achievement of data saturation for this study occurred when no new data emerged from the participants through semistructured interviews as well as data analysis

throughout the data collection process (Etikan et al., 2016). In qualitative explorations, researchers conduct interviews to accomplish data saturation (Fusch & Ness, 2015). Achieving data saturation is the key indicator to conclude data collection because there is an absence of new or relevant insights from the sample population (Marshall et al., 2013). Data saturation confirms sufficient and quality data collection in qualitative research (Marshall et al., 2013).

Ethical Research

Research protocols benefit society, respect human dignity, and adhere to informed consent principles (Artal & Rubenfeld, 2017). Therefore, qualitative researchers should consider ethical practices when assessing their processes to ensure adherence to the ethical practices of respect, autonomy, confidentiality, and beneficence within their research (Petrova et al., 2016). As a scholar consultant in Walden's DBA consulting capstone program, before engaging with the potential participants for this study, I attained preapproval from Walden University's IRB (Approval # 04-07-17-0665213). The executive directress signed a DBA Research Agreement that described the terms of the partnership between Walden University and the client organization. The IRB granted permission to gather and analyze qualitative data from multiple data sources for this study that included the use of interviews.

To adhere to Walden's ethical principles, each senior leader of the organization signed an informed consent before interviews via e-mail. Attaining consent before collecting data safeguards the participant's rights and preserves the research reliability (Beskow, Check, & Ammarell, 2014). The Consent Agreement I provided to the SLs

encompassed a brief purpose of the study, interview procedures, privacy clause, and discomforts, and risks and benefits of participating in the study. It is the researcher's responsibility to inform participants of the various aspects of the research in a comprehensible language that includes voluntary participation and how they can withdraw from the study at any time (Sanjari et al., 2014). Participants could withdraw from the study by communicating with me either by phone or e-mail. An objective of informed consent is participant autonomy (Artal & Rubenfeld, 2017). If a participant expressed the desire to withdraw from the study, I would eliminate their phone recordings and interview transcripts by deleting all electronic data along with destroying any written records. Furthermore, if a participant requested withdrawal, he or she would receive an officially written acknowledgment of withdrawal and a confirmation of the removal of data. Petrova et al. (2016) purported written correspondence helps to support the participant's right to disengage from a study without incurring retribution.

The use of an incentive to participate in a study is an ethical consideration for the researcher. An advantage of using incentives is a higher motivation for individuals to become a study participant (Robinson, 2014). However, a disadvantage is a significant motivation for participants to provide false interview responses to attain an incentive (Robinson, 2014). Hence, to circumvent the collection of fictitious interview data, nonprofit leadership recruitment occurred in the absence of any incentive, reward, or compensation. Nevertheless, a benefit from this study might involve participants sharing context-related knowledge to facilitate solutions to business problems and advance best practices (Abma & Stakes, 2014).

Continuous engagement in ethical procedures such as protecting the participants' identity diminishes the risk of unwarranted harm to participants through preserving confidentiality (Beskow et al., 2014). I aimed to safeguard participant confidentiality. Petrova et al. (2016) proffered safeguarding a participant's privacy necessitates a researcher's effort in demonstrating self-governance and concealment. A self-governance action to protect participants confidentiality that aligns with the ethical guidelines set forth by Walden University encompasses storing and securing amassed data in a secured home office cabinet for at least five years before destroying it (see Walden, 2017). Petrova et al. (2016) recommended assigning pseudonyms to shield the identity of participants and organizations. I implemented procedures to protect the study's participants from any harm throughout the research process, and designated participants' pseudonyms encompassing an initial and matching number to prevent the exposure of their identities and ensure confidentiality. I also assigned the pseudonym (XYZ) to replace the name of the client organization to protect its privacy.

Data Collection Instruments

Initiation of this qualitative single-case study occurred upon attaining IRB approval from Walden University. I functioned as the principal instrument to collect data. Qualitative researchers serve as instruments when conducting interviews (Kornbluh, 2015). I collected data through semistructured recorded telephone interviews using open-ended questions, interview notes, and organizational documents provided by the client organization. Starr (2014) acknowledged in qualitative research, the interview process is a conventional method used to collect descriptive rich text data. The purpose of executing

interviews was to attain a direct account of strategies nonprofit leaders use to develop succession plans. Yin (2018) contended participants' sharing their experiences through responding to semistructured interview questions play an active role in the data collection process. In preparation for conducting my interviews, developing an interview protocol (see Appendix) was necessary to steer this study.

The case study interview protocol is an explanation of the actions and guidelines steering the research (Yin, 2018). To achieve structured and rigorous measures to increase the study's reliability, Castillo-Montoya (2016) recommended including the central research question that aligns with the interview questions in the interview protocol. Koch, Niesz, and McCarthy (2014) noted rendering explicit details regarding the interview protocol's design and the interview question's origination. The Baldrige Performance Excellence Framework and Criteria (2017) served as a guide for developing the line of questions for the semistructured interviews.

I used a semistructured interview protocol to capture thorough responses to five open-ended questions that addressed the overarching research question. Fleming, Phillips, Kaseroff, and Huck (2014) posited in some instances, qualitative researchers might need to ask probing questions to achieve a deeper understanding of a response. Each participant approved digital recorded interview encompassed a time limit of 45 to 60 minutes. Prescribed interview times help the researcher retain focus, and it maintains participant's confidence that the researcher will adhere to their promise (Seidman, 2015). I manually recorded interview notes in a journal. To enhance the reliability and validity of the collected data, following each interview, an analysis of my journal notes occurred

to ascertain any individual bias. Circumventing personal bias was a necessity to ensure ethical research (Yin, 2018). Henceforth, managing researcher bias and the implementation of reflexivity was an expectation for substantiating my integrity and the study's findings (see Chenail, 2011; Fassinger & Morrow, 2013).

Functioning as the data collection instrument in this case study permitted me to use additional sources of data relevant to the successful strategies nonprofit leaders use to plan for succession (Starr, 2014). In a case study, researchers use various sources of data to balance, substantiate, and expand different data sources (Morgan, Pullon, Macdonald, McKinlay, & Gray, 2016). Besides gathering data from the interviews, I requested and received by e-mail further documentary data that included organizational internal documents and reports. Additional data derived from GuideStar, an online information service specializing in reporting on U.S. NPOs (GuideStar, 2018). In a case study, using several relevant data sources was a vital approach to achieve conclusive findings and to ensure the reliability and validity of the study (Yin, 2018). Member checking is an element of the interview protocol. In the interview process, member checking became integrated to advance the reliability and validity of the data collection tool. Kornbluh (2015) proffered member checking facilitates the trustworthiness of a research tool. I returned the findings or data interpretations to participants to determine if the findings or data interpretations accurately reflected their experiences (Harvey, 2015). Direct communication with each participant served to corroborate and validate the transcribed data accuracy (Harvey, 2015). As the principal data instrument for this study,

implementing member checking and data analysis throughout the process permitted adjustments to my performance and helped in maintaining the research focus.

Data Collection Technique

The data collection techniques used in this study was semistructured recorded phone interviews and a review of client organizational documents. Researchers use semistructured interviews to collect reliable data (Agran, MacLean, & Andren, 2015). A researcher commonly records interviews and later transcribe the data because these actions protect the interview's full content and facilitate categorization and analysis of the data (Seidman, 2015). Recording phone interviews were pertinent because note-taking alone is not always a practical strategy because of the vast amount of data the researcher will collect (Alsaawi, 2014). Throughout the interviews, the participants responded to five open-ended interview questions aligning with the interview protocol. Follow-up questions were necessary.

Multiple advantages exist in using an interview as a data-collection technique in a qualitative case study. According to Marshall and Rossman (2016), the semistructured interview process provides structure and allows the researcher to use open-ended inquiries to extract the perspectives and experiences of participants regarding a phenomenon. When recording interviews, the interviewer tends to adhere to an interview protocol (McGonagle, Brown, & Schoeni, 2015). Conducting semistructured interviews allows researchers greater concentration on significant areas of concern yet while providing flexibility for unanticipated issues, which the researcher may explore in more detail with additional questions (Baškarada, 2014; Seidman, 2015).

Baškarada (2014) reported using semistructured interviews as a data collection instrument can intensify a researcher's risk of fostering insufficient study findings. An apparent threat to the interview process occurs when the interview process structure is faulty, and the interviewer asks closed-ended questions resulting in minimal responses (Friborg & Rosenvinge, 2013). When researchers conduct semistructured interviews, they can experience the risk of participants providing untruthful interview responses, which can diminish the reliability of the research results (Yu, Abdullah, & Saat, 2014). Furthermore, researchers risk the collection of appropriate data to construct patterns and themes when participants do not fully and truthfully provide information (Yu et al., 2014). Using telephone interviews is a cost-effective data collection approach; nonetheless, the accumulation of large volumes of verbal data may be difficult to manage (Chetty, Partanen, Rasmussen, & Servais, 2014; Yin, 2018). Farooq and de Villiers (2017) communicated telephone interviews enable interviewees to speak more openly. However, a weakness in conducting telephone interviews occurs when a participant provides minimal responses or deviate from the topic. Interviewing by telephone necessitates immense attentiveness to ensure that the interviewee remains engaged, otherwise limited data will be available for collection (Farooq & de Villiers, 2017). Researchers should encompass an awareness of the general disadvantages that can prevent the success of semistructured interviews (Baškarada, 2014).

In addition to semistructured interviews, I augmented the data collected from the interviews with current organizational documents, and historical documentation. Documents provide precise specifics about a case and expand the information obtained

through interviews (Yin, 2018). The client organizational documents that I evaluated included bylaws and mission statement; data from internal and customer surveys; strategic plans; financial reports; performance results; and data from GuideStar, a nonprofit organization database. Additionally, to obtain further information about my client organization, I performed online searches.

Numerous advantages are present for implementing multiple data collection techniques. According to Yin (2018), a case study should encompass at least two evidentiary sources for data collection. Using multiple sources of evidence helps in expanding the knowledge about the study and helps in recognizing patterns and themes. Implementing various sources of evidence in a study provides an opportunity for achieving data saturation (Hlady-Rispal & Jouison-Laffitte, 2014). A researcher can use triangulation to draw sound judgments from multiple sources of evidence, which enhances the credibility of the study (Casey & Murphy, 2009; Houghton et al., 2013).

Researchers using only interviews as an evidence source run the risk of attaining poor results (Yu et al., 2014). However, researchers deciding to use various sources of evidence sometimes misunderstand the qualitative research techniques (Marshall et al., 2013). An inherent disadvantage of using organizational documentation as a data collection method is the possibility of attaining erroneous information or incomplete details (Casey & Murphy, 2009). Yin (2018) expressed using various evidence sources is a disadvantage due to creating more complexities in the data analysis process. Collecting large volumes of different data from evidence sources to analyze is time consuming and can become cumbersome (Yu et al., 2014).

To assert the collected data accuracy, I used member checking following each interview, and after data analysis. Member checking is summarizing the information obtained from the participants and requesting their feedback on the accuracy of the information (Yin, 2018). Permitting participants to corroborate the emic data increases the study's trustworthiness (Kornbluh, 2015). Participant involvement in checking and confirming findings diminishes researcher bias (Birt et al., 2016). To implement member checking, the participants of this study reviewed their interview responses to ensure accurate representations of their perspectives and experiences. Yilmaz (2013) posited member checking plays an essential role in the data collection process, and the researcher should ensure to accurately record and comprehend participant's responses to the interview questions.

Data Organization Techniques

Data organization refers to the processes of managing qualitative data (Ranney et al., 2015). Gibson, Webb, and Lehn (2014) suggested researchers use software to track and organize data. NVivo 11 is data organizational and analytical software, which allows researchers to analyze their data (Castleberry, 2014). The software captures specific information such as themes or trends to help build a body of evidence to support a researcher's case (Castleberry, 2014). To organize raw data, I used the NVivo 11 software. I also used Zotero software for organizing data that related to the study's references. The Zotero application helps researchers in collecting, organizing, formatting and sharing their resources proficiently (Idri, 2015). Beskow et al. (2014) stressed data organization necessitates a researchers' commitment to maintaining the confidentiality of

participants' information. All recorded interviews, notes, client and organizational documents will remain protected in a locked home office cabinet only accessible by me for 5 years.

Audit trails are records kept by qualitative researchers on how they conduct their studies (Anney, 2014). A researcher using an audit trail can use the process to assess both the process and the output of their research for reliability (Kaczynski, Salmona, & Smith, 2014). Maintaining the confidentiality of collected information demonstrates the significance of preserving ethical research practices along with participants' confidentiality (Beskow et al., 2014). Interviewees and the client organization received pseudonyms and given alphanumeric numbers only known to the scholar consultant to ensure their confidentiality. The synthesis of the audiotaped interview recordings will remain private and protected by me. The destruction of these items will transpire 5 years from data collection through shredding all notes, organizational records, and the physical disposal of any recordings. I will destroy computer documents by transferring data to a portable hard drive and physically destroying the portable hard drive.

Data Analysis

Implementing methodological triangulation for this single-case study was appropriate. Methodological triangulation is a tool that aims at increased validation and understanding using more than one type of data collection technique to study and to strengthen the validity of the data (Carter, Bryant-Lukosius, DiCenso, Blythe, & Neville, 2014). Researchers use methodological triangulation to facilitate data validity through comparing different data from semistructured interviews, field notes, and organizational

documents (Cope, 2014). Flick (2017) purported three justifications for using methodological triangulation, completeness, contingency, and confirmation. Upon completing data collection and member checking, I triangulated the interpreted interview data and secondary documentation using methodological triangulation.

Organizing data from this study occurred by using an electronic organization system. Tummons (2014) argued using computer software programs for qualitative data analysis enables rigor and reliability in a study. In this case study, I used NVivo 11 software to analyze as well as organize data gathered from three interviews. Plamondon, Botorff, and Cole (2015) posited the software supports researchers with a practical way of organizing interview data and finding connections that benefit the data analysis process. Using this software facilitated the coding of the interview transcripts. I used NVivo to help in recognizing themes to complete the analysis of the study. The software captured specific information such as themes or trends that helped build a body of evidence to support the researcher's case (Castleberry, 2014).

I focused on the key themes that developed from interview transcripts for consistency. An extrapolation of the key themes addressed the research question to achieve the objective of the study (Xu & Recker, 2012; Yin, 2018). I correlated the emerging interpretive themes from the interviews along with the literature (including new studies) and the conceptual framework. The conceptual framework of this study was knowledge transfer in connection with succession planning. The conceptual framework of knowledge transfer involved themes that indicated the significance of what tacit and explicit knowledge leaders possessed. Activities in knowledge transfer involved

preparing a successor and sustaining organizational continuity when an incumbent departs. The knowledge transfer activities served as the source for identifying the key themes of this study.

Reliability and Validity

Reliability

Reliability of data and findings are vital aspects of any research study (Kaczynski et al., 2014). In a qualitative study, reliability includes the dependability and the replicable extent of the results obtained (Noble & Smith, 2015). To achieve reliability, a researcher can implement triangulation and audit trails (Anney, 2014; Hlady-Rispal & Jouison-Laffitte, 2014; Houghton et al., 2013). Hlady-Rispal and Jouison-Laffitte (2014) described triangulation as a tool that researchers can use to explore a phenomenon from various perspectives and merge data from multiple sources. To ensure reliability, I used multiple methods for collecting data that included interviews and organizational documents to identify strategies for succession planning.

The audit trail comprises of decisions made throughout the research by the researcher that illustrates their methodological rationale, contextual data, and interpretive judgment on how different themes developed from the results attained (Anney, 2014; Houghton et al., 2013). Scholars using an audit trail improve the dependability of their qualitative research because they can use the process to assess both the process and the output of their research for consistency (Kaczynski et al., 2014). As suggested by Hlady-Rispal and Jouison-Laffitte (2014), I used data triangulation to help facilitate the reliability and validity of the findings. Yin (2018) noted data triangulation encompasses

the use of diverse sources of research data or instruments such as interviews, participant observations, current documents, and archival documents. Additionally, as posited by Foster, Hays, and Alter (2013), I used various sources of data or research instruments such as interviews with organizational leaders, current organizational documents, and historical documentation to analyze the results.

Validity

Validity is important to assessing qualitative research quality because validity ensures that collected data is credible, dependable, and justifiable (Morse, 2015). Validity in qualitative research refers to the integrity and method implementation along with the accuracy in which the conclusions precisely reflect the data (Noble & Smith, 2015). It is necessary for a researcher to select the appropriate research method, design, sampling option, and data analysis in assessing the validity of the study (Leung, 2015). Hence, qualitative researchers can apply the elements of credibility, transferability, and confirmability to evaluate the soundness of their research (Leung, 2015). Also, attaining validity consist of achieving data saturation, which helps in demonstrating credibility, transferability, and confirmability of the research results (Leung, 2015).

Credibility

Triangulation is a strategy that a researcher can use to address the research credibility (Morse, 2015). Implementing the triangulation strategy allows researchers to complete numerous methodical assessments of research results with various resources to ensure the study's creditability (Carter et al., 2014). Houghton et al. (2013) proposed, by executing methodological triangulation, the researcher can substantiate the consistencies

of findings within several data collection types. Following the recommendation of Harvey (2015), I used dissimilar processes such as member checking along with various types of data such as business documents and participant interviews to ensure the credibility of the study.

Transferability

Transferability relates to the applicability of research results to other contexts (Cope 2014). A reader should be able to create meaning and determine if they can connect their experiences to the findings to satisfy the criterion of transferability (Houghton et al., 2013). I addressed the transferability of my study by describing in detail the original context of the study that incorporated context descriptions, methods of research, findings, and data samples so readers may establish the transferability of its results to their context (Houghton et al., 2013). Future researchers will have the opportunity to benchmark the research study to advance the discovered themes and strategies. Sousa (2014) noted the applicability of the results to other events and circumstances, corroborates the transferability of the findings related to the research problem.

Confirmability

Confirmability is establishing if the results of a study is unbiased, precise, can sustain corroboration, and have minimum researcher reflexivity (Noble & Smith, 2015). Following each interview, I transcribed the participants' responses into data and each participant received a copy for confirmation of accuracy, which is the member checking practice. In qualitative research, participant response validation is an acceptable

procedure to determine trustworthiness (Billups, 2015). Comparable to ensuring dependability, attaining confirmability of the study included using the triangulation procedures and the same audit trail. Billups (2015) reported confirmability advances the audit trail and includes using field and personal notes, and a journal. Cope (2014) expressed researchers can facilitate confirmability by disclosing the interpretation of the data amassed throughout the study and confirm the study findings and not individual biases or preconceptions.

Data Saturation

Data saturation refers to the point within the data collection where no new information is present, and the amassed data is adequate to perform the data analysis (Etikan et al., 2016). After completing the interviews, I reviewed the interview data in efforts of ensuring data saturation. Fusch and Ness (2015) reported researchers can execute member checking to affirm data saturation. In conducting follow-up member checking interviews, I acquired rich data and ensured its saturation (Marshall et al., 2013).

Transition and Summary

In Section 2 of this qualitative single-case study, I explained the purpose of the study topic, the research methodology and design, the role of the researcher, and data collection methods and techniques. I conducted three semistructured telephone interviews with three different SLs of a small NPO in the southeastern United States to explore the succession planning strategies the SLs use. I continued conducting interviews until data

saturation occurred. The SLs of the client organization granted unlimited access to organizational documents.

Electronic data files became implemented to organize the collected information. Implementing methodological triangulation facilitated data collection and analysis of organizational documents. Amassing performance data from various sources such as organizational documents, GuideStar, and interview results, I enhanced neutrality to ensure that all factors impacting performance attained consideration. Upon completing data analysis, I returned the findings to participants to determine if the findings accurately reflected their experiences.

To collect data for this qualitative research study, I used the 2017-2018 Baldrige Excellence Framework and interview questions. The Baldrige criteria from the 2017-2018 Baldrige Excellence Framework (2017) permitted me to assess the organization's strengths and deficiencies. Section 3 will initiate with an organizational profile and encompassed a comprehensive examination of the ensuing categories for XYZ organization: (a) leadership; (b) strategy; (c) customers; (d) measurement; analysis; and knowledge management; (e) workforce; (f) operations, and (g) results. Also, Section 3 will encompass findings from the study, a synopsis of key themes, project summary, and contributions and recommendations future research.

Section 3: Organizational Profile

XYZ is an award-winning community student service organization that seeks guidance from others, promotes opportunities for higher quality of life through education, encourages self-development, healthy lifestyles, and develops local leadership to respond to the community needs. The founders initiated the organization in 1992 on a local college campus and attained its nonprofit status in 2013. The organization has over 500 active, multigenerational members providing education and other social services to improve the social disposition of underrepresented populations.

The senior volunteer leaders at XYZ understand to inspire the servicing communities and achieve mission fulfillment necessitates meeting the needs of the people. Through the leverage of volunteers, suppliers, community partners, donations, membership dues, fundraising events, and chapter leadership in 17 collegiate and professional chapters, the organization has been sustainable and received numerous awards for outstanding community service (see Table 10). Despite organizational efforts in promoting a higher quality of life for individuals and improving the social disposition of underrepresented populations, strategic planning for leadership succession remains a viable challenge for the all-volunteer multigenerational organization.

Key Factors Worksheet

Organizational Description

XYZ is a 501(c)(3) organization based in the southeastern United States. The purpose of XYZ is to foster an environment conducive to learning about the history and role women of color have in society; develop local leadership to respond to the

community needs; and enhance the survival and well-being of women of color through service, scholarship, and sisterhood. In the organization's founding state, there are currently 35,581 501(c)(3) NPOs, 3,251 function in XYZ's capacity of educational community service with 75 organizations operating in XYZ's service areas.

The aspect volunteer educational community service denotes empowering youth through education and providing training programs to facilitate success in higher education, the workplace, the community, and society. Out of the 75 organizations, 18 (or 24%) encompass gross receipts extending from \$0 to \$100,000, 30 organizations (or 40%) with gross receipts \$101,000 to \$200,000, 23 (or 31%) with \$201,000 to \$500,000 gross receipts, and four (or 5%) of the organizations with gross receipts above \$500,000 annually. XYZ's gross receipts fall in the 24% group of educational community service organizations with total gross receipts range \$0 to \$100,000.

Organizational environment.

Product offerings. XYZ's product offerings include the Planting Seeds of Success (PSS): (a) moral and education guidance, (b) promoting spiritual growth, (c) well-being enhancement, and (d) leadership development. Using the PSS as a comprehensive approach, SLs benefit members of underrepresented communities and their stakeholders through awareness, self-development, and training. In 2017, 950 women and children in two states received services from XYZ Company.

Leaders and volunteers of XYZ empower women by providing moral and educational guidance. The moral and educational guidance includes a community service project and college and university tours. The implementation of the service project

facilitates awareness of breast cancer in African American communities. Additionally, XYZ leaders and their workforce provide an annual theatrical presentation to illustrate awareness of the African American woman's story, experiences, and triumphs. The college and university tours provide an opportunity for young women in high school to visit college and university campuses to encourage students' aspirations for postsecondary education.

A significant event intended to promote spiritual growth occurs annually through a women's retreat and a gospel music festival. The yearly retreat affords a distinct opportunity for women from various backgrounds to assemble for spiritual regeneration, get in tune with their physical and mental well-being, and celebrate their lives. Designed to educate and provide cultural enhancement, the gospel music festival artists share the African American sacred music experience with all people. The musical performance and presentations are suited to people of all ethnic groups, ages, and interests.

XYZ senior leadership and its workforce share a commitment to presenting a positive image of African American women that enhances their survival and well-being. This commitment is evident through a threefold approach that includes print media, action, and collaboration. Through quarterly distribution of a health magazine, readers learn about the fitness challenges of African American people, and the magazine's target audience is those who would not regularly receive health check-ups and physical examinations. The action of taking-a-grandparent-to-the-doctor day motivates the senior population to remain healthy. Collaborating with for-profit and NPOs, XYZ leaders conduct a soul food festival. Chefs participating in the soul food festival provide

attendees with healthy dishes and education on food portion control and how to prepare healthy meals at home.

The development of local leadership comprises a Home Guidance program, a junior XYZ program, XYZ to the polls, and voter registration. The mission of the Home Guidance program is to inspire parents to become active in their children's education process. XYZ leaders and volunteers provide training on money management, time management, and parental skills. Over 200 parents throughout the servicing area are actively engaged in the program. The junior XYZ program provides young women who are economically, socially, and academically deprived an opportunity to develop leadership skills through formal mentoring, thereby becoming productive members of society. Educating others to become active in society's political process is part of building the complete leader, and XYZ leaders and volunteers help to ensure individuals grow by becoming registered voters and having reliable transportation to the polls on election day. XYZ leaders incorporate a combination of resources to deliver their products. Resources include print and broadcast media, web-based media, social media, and on-site and off-site community events.

Mission, vision, and values (MVVs). XYZ's core competency of volunteer-based, student-centered services to underrepresented populations directly correlates to the mission, vision, and values (MVVs; see Table 2) and is a competitive advantage in the organization's market. The mission is specific: XYZ organization seeks to improve the social disposition of underrepresented populations through community service, education, and other social services in their respective communities. XYZ leaders and staff expend

countless hours of service, skills, and knowledge responding to the needs of the community and working to provide solutions to those needs through classroom and community training. XYZ's values described as guiding principles are foundational to leaders' planning of events and business systems. SLs promote the core competency of XYZ by anchoring their services in the center of the community to impact and influence those in need of assistance. I reviewed postings on XYZ's website and social media platforms from parents and students detailing student achievements and academic progress, which indicated the success of XYZ Company services and the endeavors of SLs and their workforce.

Table 2

XYZ Mission, Vision, and Values (MVV)

Mission
To provide community service, education, and other social services.
Vision
To implement sustainable programs that improve the lives of underrepresented populations through service, scholarship, and sisterhood.
Values: Guiding Principles
We advocate opportunities for higher quality of life through education. We deliver access to educational and career building resources. We ensure awareness of the structural factors that require a societal change to increase healthy lifestyle behaviors. We provide culturally appropriate health programming.

Workforce profile. The all-volunteer workforce profile (see Figure 1) illustrates the employees' profile and includes job title, gender, and leadership tenure, which are reflective of the professional standards needed to achieve the guiding principles of the organization's MVVs. XYZ has a highly educated workforce with 75% of individuals holding bachelor's or master's degrees. One hundred percent of SLs have received bachelor's degrees or master's degrees, and one leader has earned a doctoral degree. Additionally, 4% of SLs received specialized certifications and licensures in education, finance, real estate, and medicine. XYZ company retains top talent that brings a wealth of professional experience and knowledge to the organization such as educators; training specialists; managers, financial specialists; entrepreneurs; and psychology, medical, and regulatory specialists. Individuals desiring to work in the organization must adhere to XYZ's strict criteria of being of good moral character and be in attendance or a graduate of an accredited college or university. XYZ has no organized bargaining units or specific health and safety requirements.

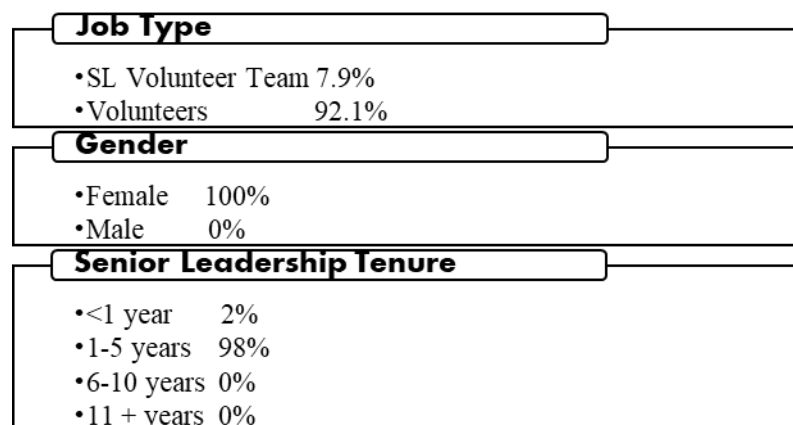


Figure 1. XYZ's All-volunteer workforce profile.

Assets. Assets for XYZ Company comprised the workforce's tacit and explicit knowledge. XYZ does not own or rent a physical office space. XYZ leaders work in a virtual environment. Throughout the southeastern United States, local chapter meetings occur on a designated college campus and other public venues, such as a local library. The organization rents a post office box; leaders use storage facilities in two states in the southeastern United States to house company records and organizational paraphernalia merchandise.

Regulatory requirements. In 2013, the SLs of XYZ worked with representatives of the Internal Revenue Service (IRS) to become licensed as a 501(c)(3) tax-exempt NPO. As a 501(c)(3) NPO, it is a requirement for XYZ leaders to file an IRS Form 990 for financial reporting annually. To maintain compliance with federal, local, and state laws, XYZ leaders analyze financial records, participant records, and employee records.

Organizational relationships.

Organizational structure. XYZ Company is a 501(c)(3) NPO with an organizational structure and governance system in which SLs share responsibilities with the dedicated volunteer workforce. The BOD or chain of command (see Figure 2) consists of the client leader, five directresses, and multiple officers. The client leader and SLs guide XYZ Company's MVVs by presenting operational assignments to each SL, officer, and volunteer. SLs provide support to clients to improve their social disposition through community service, education, and other social services to meet their needs effectively. Leaders acquire funding and resources through community donations, partners, and organizational dues.

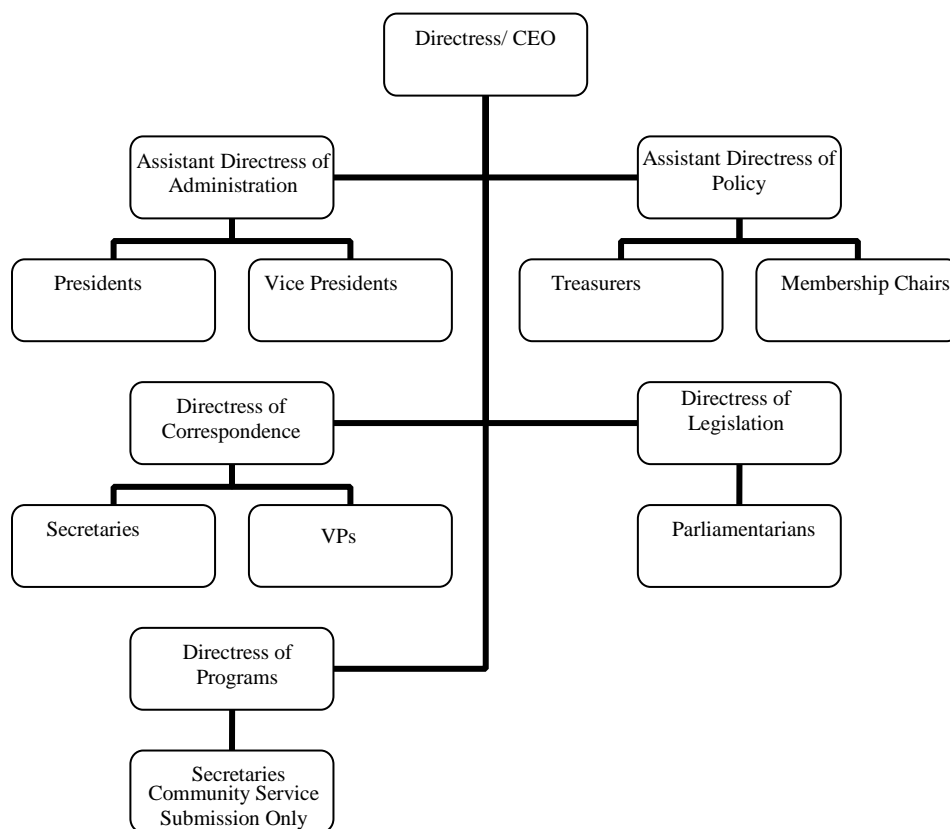


Figure 2. XYZ's Chain of command.

Customers and stakeholders. XYZ's key customers are underrepresented populaces of high school and college students and parents in designated service areas and stakeholders committed to creating a higher quality of life for disadvantaged people. XYZ's relationship with its customer groups is valuable because some customers are a part of XYZ's workforce. Table 3 displays key customers and stakeholders of XYZ responsible for accomplishing the organization's objectives.

Table 3

Key Customer and Stakeholder Requirements

Key Customers	Key Requirements
Students (Middle/high school and college)	Member of an underrepresented group.
Parents	For parents' children to improve academic skills, learn life skills, and develop personal growth.
Key Stakeholders	Key Requirements
Board of Directors	Strategic planning, joint development of budget and financial reporting. Comply with local, state, and federal, regulations. Adhere to mission and guiding principles.
Workforce	Maintain credentials/certifications Engage key customers and partners to sustain participation. Participate in community service events.
Middle/high schools/colleges/universities	Provide campus access for young women to tour. Collaborate with parents and high school faculty and provide college preparedness and reduce high school and college dropout rates. Develop articulation agreements for shared student success data and minority scholarships
Partners and donors	Behave ethically and comply with regulations and being attentive to servicing clients' and stakeholder's' needs.
Community	Provide skilled, knowledgeable, and responsive staff and financial support and promotion. Provide support for organization to mission and objectives.

Suppliers and partners. Key suppliers, partners, and collaborators play essential roles in providing resources to XYZ's capacity to develop new and innovative programs to effectively meet the needs of community members in the service area. Table 4 shows the roles key partners, suppliers, and collaborators play in XYZ innovativeness and competitiveness. XYZ leaders manage communications with suppliers, partners, and collaborators in the same way they manage communications with customers; leaders communicate via regular face-to-face meetings, conference calls, e-mails, and newsletters.

Table 4

Key Suppliers, Partners, and Collaborators

Suppliers, partners, and collaborators		Influence on organizational systems	Influence on innovation and competitiveness
Suppliers	Fun Cycling PRK	Provides student transportation and food for community events.	Understands current trends and best practices to empower underserved communities.
Partners	Black Men Inc. Man-Up Mentoring Boys and Girls Club Bound Center for Girls	Provides advocacy, service projects, and student mentoring.	Joint marketing in conveying XYZ's mission, vision, and guiding principles to the community.
Collaborators	State Department of Education	Provides scholarships and other student financial assistance.	Provides funding to students to bridge the financial gap to achieve their educational goals.

Organizational Situation**Competitive environment.**

Competitive position. In the southeastern United States there are 13 organizations including XYZ considered as 501(c)(3) youth servicing-based agencies. Large local and national youth servicing-based agencies such as Jack and

Jill of America, DreamGrلز Inc, Step Up, and two partners of XYZ, the Boys and Girls Club, and Bound Center for Girls do not operate with a 100% volunteer workforce. Even while partnering with the latter organizations to serve a typical customer, XYZ employees are indirectly competing with their employees to show their partners and customers the value that XYZ brings to the community. The relationships that XYZ Company SLs had with partners and stakeholders helped to meet customer needs and produced innovative delivery approaches for empowering, mentoring, and life skill training. Encompassing knowledge of the partners and stakeholder's competitive positions provided awareness to XYZ Company SLs about persisted cultural and social challenges in the servicing communities.

Competitiveness changes. Nonprofit leaders implementing strategic plans is critical for long-term organizational survival and market competitiveness. A leaders' focus on leadership changes, securing resources, organizational performance, and fulfillment of societal functions may enhance organizational strategic planning. Although XYZ leaders encompass strategic advantages, strategies for succession planning is a necessity. For instance, Participant 2 noted when joining XYZ Company, a succession plan was not in place and comprehensive and ongoing leadership training was not available. Implementing succession strategies may help SLs produce a pipeline of qualified leaders and make leadership transition an effective and efficient process. Changes that influenced XYZ SLs competitive advantage included variations in the youth's social and financial needs. Additionally, other youth-based agencies in XYZ's servicing community offered

strong marketing resources, with extensive public awareness comparative to the XYZ Company mission of improving the social disposition of underrepresented populations through community service, education, and other social services.

Comparative data. Sources of competitive and comparative data for XYZ are The Foundation Center and GuideStar that provide information on student-based service organizations. Explorations of comparable youth service organizations displayed continued and enhanced youth participation and paid employees along with a volunteer staff to fulfill their mission. Leaders of larger organizations used various social media platforms and company websites to connect with the workforce, stakeholders, partners, collaborators, and benefactors.

Strategic context. Driven by the organization's mission and vision, XYZ leaders seek recognition as the standard of excellence in the various servicing areas for improving the social disposition of young women through service, education, and sisterhood. In doing so, leaders must overcome some strategic barriers while maintaining their strategic advantages listed in Table 5. The strategic barriers that impact XYZ's imminent success encompassed board engagement, reactive management, strategic planning, leadership recruitment and development, performance measurement, and fluctuating funding. SLs analyze monthly findings from each of the organization's 17 collegiate and professional chapters to assess the benefits gained through current relationships. Furthermore, attaining chapter data is useful to overcome challenges in the strategic planning process. The strategic advantages for XYZ leaders included supportive

and engaged community, reputation and affiliation, collaboration with partners, and loyal donors.

Table 5

Key Strategic Challenges and Advantages

Challenges
<ul style="list-style-type: none"> -Board engagement -Reactive management -Strategic planning -Leadership recruitment and development -Performance measurement -Fluctuating funding
Advantages
<ul style="list-style-type: none"> -Devoted workforce -Collaboration with partners -Supportive and engaged community -Reputation and affiliation -Loyal donors

Performance improvement system. Monthly, the local chapter leaders of XYZ report to the BOD on budget information, chapter events, leadership areas of concern, monthly, quarterly and annual goals and key analytics including the number of specific event participants and the number of visitors and the client's website webpage views. Customers provide survey responses that are valuable in capturing information to help leaders in providing services and enhancing the overall customer experience. Though XYZ leaders receive significant information on each chapter status, there is no formal process for evaluating performance improvement, which is an operational disadvantage. An operational disadvantage ensues because leaders lack a path for developing procedures that track and

document why organizational changes are needed, why the changes indicate improvement within the organization, or how to continuously refine and reevaluate what the leaders are doing to achieve the organization's mission

Leadership Triad: Leadership, Strategy, and Customers

Leadership

Senior leadership.

Mission, vision, and values. The MVV, and the core competency of volunteer base student-centered services to underrepresented populations became constitutionally enacted in 1992. The sole way to amend the MVV is by an amendment vote by members at the biennially national conference. XYZ's values/guiding principles support the fulfillment of their vision, keeping employees' focus on their mission with behaviors and expectations. The senior leadership team consists of six directresses, 17 presidents, and 17 vice presidents. They ensure broad stakeholder input and collaboration in communicating and executing the MVV. SLs communicate formally and informally with student-centered and stakeholder focused agencies, schools, teams, and individuals. The MVV statement is available on the XYZ website and in various publications to stakeholders, and new employees. Furthermore, to make transparency a priority, leaders publish all community activities on XYZ's website.

Legal and ethical behavior. Leaders foster and promote high standards for legal and ethical behavior at XYZ. It is a requirement for national directors and executive board chapter leaders to take an oath at the start of their respective terms promising to engage in ethical and legal behaviors within the organization and the

community. It is an impeachable offense for chapter and national leaders if they engage in practices that are unethical or illegal. SLs require a high standard of legal and ethical behavior across all organizational divisions and at all levels which enable leaders to focus on ethical behavior and equity and empower employees to make effective decisions. The national board of directors mandate all leaders, staff, and stakeholders to participate in annual ethics training. XYZ leadership team further encourages an organizational environment that necessitates legal and ethical behavior through their support of proposals that improve financial transparency and exhibit a commitment to the ethical use of community resources.

Communication and engagement of workforce and customers. Operating in a virtual environment, XYZ leaders communicate with and engage the all-volunteer multigenerational workforce in a top-down communication and bottom-up feedback approach. Leaders encourage and promote open, two-way communication through the internal controls of trust, employee motivation, and the merging of individual and organizational goals in a chain of command communication approach to accomplish the objectives of the organization. Internally, the communication between leaders became challenging which caused a hindrance in transferring or sharing organizational knowledge.

Leaders and other staff communicate vital messages, decisions, organizational change, and performance results to the entire workforce and key clients via multiple channels such as e-mail-list-serve, virtual and face-to-face meetings, phone conversations, and print correspondence. Leaders also use

GroupMe and Meetup to schedule and conduct business meetings and LinkedIn to foster professional networking. XYZ leaders reinforce exceptional performance through annual awards and recognition of individual and chapter performance during an awards ceremony at the National Leadership Retreat and the National Conference.

Because XYZ operates as a virtual organization with employees and key customers spread across various states and one territory, SLs must use an array of communication methods to anchor their services in the center of those communities to equally impact and influence those in need of support. Communication with students, prospective students, parents, and other stakeholders become enhanced through the communication mechanisms of social media platforms, fliers, various student organizations, and Event Brite in providing valuable information on upcoming events and available resources to address the needs of the servicing communities. To further advance engagement and communication with those who receive or would like to receive services offered by XYZ, leaders and staff members in their respective areas attend and participate in Parent Teacher Association and Boys and Girls Club meetings and events, local school system meetings and events, and college and universities Student Government Association meetings.

Focus on action. SLs drive a focus on action to achieve XYZ's mission through, joint meetings, monthly visits, and Director Performance Reviews. XYZ's leaders' joint meetings engage employees at different levels. Guided by the Robert's Rule of Order, each local chapter leader holds various sessions with their members to inspire ideas that

will become the short-term PSS Action Plan for the upcoming year, encompassing both goals relating to maintaining exceptional performance on existing projects and goals for innovation. After attaining a nonprofit status in 2013, XYZ leaders exhibited no evidence of implementing a formal strategic planning proposal describing timeframes for achieving overall long-term business goals.

Governance and Societal Responsibilities.

Governance system. XYZs National Constitution and chapter bylaws outline the duties, responsibilities, requirements and grievance processes for members, prospective members, chapter leaders and national leaders of the organization. Collegiate chapters have the additional benefit of university rules and regulations for recognized registered student organizations. During XYZ Company biennially national conference, electing and installing officers for a 2-year term and training of elected officers and membership committee occurs. All SLs report to the directress/CEO who holds them accountable for their actions. Highlighted in Table 6 are XYZ's methods for responsible governance and integration into XYZ work systems.

Table 6

Methods for Responsible Governance

Methods for Responsible Governance
Enable good management, guide and monitor. Steward the resources of the organization for long-term. Crisis Management.
Adhering to fairness, honesty and respect. Publish meeting minutes on intranet and accessible to all members. Publish financial results on intranet and shared at all organizational levels.
Established by committee of existing board members and based on level of education, business experience, expertise, and background
Internal checks and balances. Following XYZ's conduct code.
Leadership development. Mentoring and coaching future leaders.

Performance evaluation. XYZ staff are not directly involved in regular board performance or evaluation; however, the directress/CEO provides feedback to the assistant directresses regarding the relative effectiveness of board actions and behaviors as they affect the organization. Also, the directress/CEO provides an evaluation of board actions from XYZ's perspective in quarterly e-board meetings with the SLs, who uses this feedback to advance board effectiveness. Each study participant asserted there is no detailed extensive organizational performance evaluation strategy. The assistant directress of administration oversees the chapter executive leadership team and provides feedback to those executive members, usually after a complaint comes forth from a

chapter or national director member. Study Participant 1 noted, SLs consistently practice reactive management instead of predictive management whereas using the latter could help in reducing the number of challenges that require the reactive approach. On the national level, there is no specified performance evaluation set up; the assistant directress of policy oversees the remaining directors, with her position overseen by the directress/CEO.

Legal and regulatory. XYZ Board and CEO are responsible for legal, regulatory, ethical, risk, and social responsibilities. To ensure management accountability for the organization's actions, XYZ leaders endeavor to exceed stakeholder expectations through processes that hold the organization accountable (local, state, federal, legal, and regulatory) to ensure legal compliance. XYZ participate in annual financial audits that measure compliance with generally accepted accounting principles and guidelines established by the IRS for nonprofit entities. To sustain as a nonprofit 501(c)(3) in good standing, XYZ leaders must adhere to the state requirement of annually registering as a charity that includes financial reports and the IRS necessitates nonprofit leaders to file an annual 990 tax form for the organization. One important approach which the XYZ leadership team anticipate possible public concern regarding its current and future programs, offerings, services, and operations is their participation in workshops that address current business issues (e.g., diversity and inclusiveness and the lack of accountability). In efforts of addressing the community concerns when events occur, SLs obtain event insurance to provide a safety net for the organization and the participants. XYZ also has an attorney on retainer to address any legal matter.

Ethical behavior. Ethical practices in all student/stakeholder interactions, including those with partners, suppliers, and collaborators are achievable through XYZ's proactive education and corrective enforcement of the organization's policies. The policies include the Student Code of Conduct, the Code of Ethical Conduct, the Anti-Hazing Policy, and vendor selection procedures. Policies become facilitated through training and monitoring systems related to ethical use of public funds, public disclosure, sexual harassment deterrence and reporting, hazing, intercultural competence, technology use, and copyright law compliance. Throughout the annual training session, SLs explain the ramifications of engaging in unethical and illegal behaviors. For instance, any member reported and found guilty of hazing may face penalties, legal prosecution or expulsion from the organization. Systematic internal analysis of records offers additional support in evaluating and educating members on significant governance issues, and XYZ policies clearly define the consequences for breaching ethical behaviors. XYZ SLs define partner, supplier, and collaborators ethical behavior expectations and monitor and evaluate compliance during their quarterly meetings.

Societal well-being. XYZ's mission, vision, and guiding principles core focus is on their customers, which encompasses their societal well-being and local community support. Considering that service is a primary tenet of the organization, in developing each service, project, and innovation, SLs consider the customers, employees, and the community. Societal well-being is a vital aspect within the organization's daily operations because community service is foundational for XYZ and service to others is a focus of operations. SLs continually search for ways to increase XYZ's scope and span of

exceptional programming like moral and educational guidance and local leadership development throughout the communities. Although there is not a set strategic plan, the mission and goal of XYZ are to help society's less fortunate, which exhibits their commitment to society well-being.

Community support. XYZ's chapter geography in two different states and one territory are critical factors in determining areas for organizational involvement and communities that XYZ personnel leverage the organization's core competencies. XYZ leaders serve as a vital resource to underprepared students, especially young women and others who are economically and socially disadvantaged to support and strengthen the servicing communities. A part of XYZ's mission includes seeking guidance from others. The leaders at XYZ network and establish partnerships with community service organizations and community businesses to identify any disparities that are impacting the well-being of members in the area. The various alliances help to grow needed resources and diminish or eliminate societal inequalities. XYZ partners with the Boys and Girls Club, Bound Center for Girls, and Scholastic Parent to provide community education services.

Annually, each organizational chapter member in conjunction with SLs volunteer to perform four community events that align with the PSS. Each program's goal is to educate, inform, rejuvenate or show positive images of African American women and men to the communities in which XYZ have local chapters. The specific programs promote a uniform set of projects while advancing the MVV of XYZ to provide service

to communities through education, political activism, community service, and the association with people.

Strategy

Strategy development. XYZ organization does not encompass a formal strategic planning document that reflects on previous years and outlines goals, objectives and strategies for the future. The needs of students, funding availability, and required resources determine key processes accomplished by the all-volunteer workforce, partners, collaborators, and suppliers. Leaders participate in quarterly e-board meetings to develop a common understanding of how to support the organization's MVV. The directress/CEO and leaders at XYZ discuss and evaluate relevant information on adopting more business-like processes, leadership recruitment and development, expansion of chapters and membership and establishing and sustaining relationships with other organizations.

Throughout board meetings, XYZ leaders discuss opportunities for innovation working with nonprofit community organizations and local businesses. Identified prospects for innovation encompass partnering with nonprofit organizations focused on how to aid disadvantaged student success during statewide academic assessment testing. An additional opportunity for innovation includes partnering with local businesses focused on how to develop local leaders in the community and its implications for positive social, political, and economic change. Setting the agenda for the annual national leadership retreat, leaders committed to developing a formal strategic plan with input from members. SL Participants 1, 2, and 3 reiterated the need for a formal strategic plan to become

more business-like to move the organization forward. Leaders at the annual retreat will focus on identifying key business priorities, outlining goals and objectives, identifying required initiatives to reach strategic goals through the creation of a strategy map, develop a balanced scorecard, and a reporting process. While XYZ leaders establish organizational priorities discussed at quarterly board meetings, by adhering to the annual retreat agenda, XYZ leaders can provide a roadmap for the organization with measurable goals.

Strategy implementation. XYZ leaders do not incorporate a concrete action deployment plan. However, leaders convert ideas discussed in monthly and quarterly board meetings into actionable items such as specific events listed under the PSS. Local chapter leaders meet with members monthly to inspire ideas and transfer knowledge that will become the short-term goals. Board members meet quarterly to reflect on those goals while considering the annual budget and yearly expense reports. Board members present the information to members via memo or group conferences. The long-term action plans for the XYZ company include advancing the organization to become more strategic in its processes, leadership recruitment, and development that provides for accessible and interactive leadership training, expansion of chapters and membership to other regions, and establishing and sustaining relationships with other organizations. A standardized performance evaluation is not present for XYZ. Hence, the assistant directress works with individuals responsible for actionable items and tracks the achievement and effectiveness of those items through monthly reports, which supports knowledge sharing to make needed changes to the actionable items.

Customers

Voice of the customer. XYZ's customer-focus culture drives its mission to improve the lives of their customers. XYZ leadership team members listen to, interact with and learn from their customers and use the information to build strong relationships. Listening methods focus on continuous communication through visits, formal meetings, phone conversations, e-mail or at conferences steered toward identifying critical needs throughout the total customer lifecycle.

The use of the various listening methods depends on the identified customer groups. For example, applications for services and orientations provide XYZ the opportunity to obtain valuable feedback from participants and parents on the organization's services and programs. XYZ personnel additionally obtain customer input via social media and surveys. Further customer feedback derives from the XYZ website where customers can choose to access the Contact Us page to relay feedback, make suggestions or ask questions about services. The directress of correspondence consistently monitors all web inquiries to ensure that the customer acquires a timely reply. SLs of XYZ can become engaged and listen to customers as well as stakeholders throughout Facebook posts and comments, Instagram posts and comments, Twitter tweets, Snapchat interactions with customers, and Skype conversations. All data collected and analyzed become an agenda item for monthly local chapter meetings.

Potential participants and customers become identified through listening methods including submitting inquiries through XYZ's web-based forms and SLs and staff members attending nonprofit and for-profit community and business meetings. SLs and

staff members address all inquiries in within 2 days and return all voicemails and e-mails within 48 hours and implement any follow phone calls as necessary. The directress of programs encompasses the responsibility of contacting participants and arranging meetings to ascertain where XYZ may have high impact in their organization and obtain actionable feedback on how to get an agreement in place to execute important community service projects. The data become shared with SLs and staff members during national and local chapter monthly meetings. Surveying current customers and partners following events and implemented services is an additional key method of listening because it provides clear, actionable feedback in a structured manner. SLs analyze the data and use the survey evidence as a source to improve future programs and to attract potential customers.

XYZ leaders characterize participant and customer satisfaction, dissatisfaction, and engagement through the distribution of immediate program satisfaction surveys (Table 7) following the conclusion of any event or service rendered. It is an organizational mandate at the national and local level that when activities and events occur, a customers or other stakeholders must complete a survey. Leaders collect and analyze survey data to determine satisfaction and dissatisfaction levels of services.

Table 7

XYZ Program Satisfaction Survey

XYZ Program Satisfaction Survey					
As a recent user of our organization's services, please share your feedback with us. Your comments and suggestions will be used to improve our services to better meet your needs.					
Please rate your satisfaction level with the following:	Very Dissatisfied	Dissatisfied	Neutral	Satisfied	Very Satisfied
Overall satisfaction with the service	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5
Ease of access to the service	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5
Assistance by staff members	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5
Extent of time it took between requesting and receiving service	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5
Have you used any of our services in the past?	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5

Understanding how customers and participants use XYZ services helps SLs improve and modify programs. Data and information from surveys become shared in monthly national and local chapter meetings. Leaders monitor web-based communication and social media sites for customer feedback.

Survey data contribute to gaining vital student information and customer satisfaction levels. Students and parents respond to survey questions that capture information that is fundamental in constructing and providing programs and improving the participant's overall experience. XYZ's leadership teams will jointly review all survey information at the National Leadership Retreat to provide data input for upcoming strategic plans. Moving in this more business-like direction will help XYZ improve customer's experiences comparative to that of competitors.

Customer engagement. The three tenets of service, scholarship, and sisterhood propel the products offered by SLs of XYZ Company. The products included helping young women build confidence through moral and education guidance, spiritual growth, well-being enhancement, and leadership development. XYZ SLs fostered feedback from current and potential customers through knowledge sharing in face to face meetings, e-mail, conference attendance, surveys, and social media outlets. Feedback provided from existing, and potential customers facilitated SLs adjusting product offerings, pursue repeat and potential benefactors, and equally impact the lives of customers.

XYZ SLs provide a variety of contact and access methods to acquire information on product offerings for customers and stakeholders. XYZ SLs implement a multi-level marketing strategy to highlight their product offerings. SLs used informational marketing

materials such as chapter newsletters, fliers, press releases, and the organization's website that involved comprehensive programming and support information presented by the organization. Through each of the marketing tools, SLs provided ways to seek information and support. Communication methods also included e-mail, face-to-face, and telephone interactions, which permitted SLs to review the product offerings progress and outcomes for customers and stakeholders. Furthermore, XYZ SLs used their participation in community events to brand the XYZ Company. Recognizing and assessing stakeholder concerns, XYZ leaders realized strong brands help NPOs acquire resources. SLs and their staff participate in many nonsponsored XYZ Company community events. Leaders and staff participation helped the organization obtain human and social resources and to build partnerships. The trust between the partners facilitated credibility to develop those resources more effectively.

Since the inception of XYZ, SLs has been committed to serving customers of underrepresented communities. SLs receive customer information through the SSS Action Plan, surveys, and community event participation to identify future customer groups. SLs upheld a commitment to reduce high school dropout rates and improve college attendance and retention rates through collaboration with other stakeholders. Since 2013, XYZ Company SLs have attained the mission, vision, and guiding principles and established core competency, which relied on the decisions and actions of national and local board members and SLs. The implementation of various marketing mechanisms and understanding the customer needs and wants, aided in the facilitating SLs actions in determining customer groups and market segmentation.

Leaders of XYZ build and manage customer and stakeholder relationships through direct communication, implementation of feedback, and engagement. Through these approaches, XYZ leaders can reach out to participants, customers, partners, and the community on a consistent basis. By using methods such as email blasts, posting of service offerings and events on social services and school bulletin boards, and newsletters, XYZ SLs can keep customers aware of upcoming events and provided services. SLs request the participants and parents to complete a survey following the completion of each service or event. XYZ SLs strive in their daily endeavors to achieve a participant and parent satisfaction rate of 95% or above on the services and the presented events.

XYZ leaders follow the outline of the complaint management process in the organization's constitution. The national president of XYZ along with a newly implemented Board of Advisors receive complaints and devise solutions. Upon the resolution of a customer issue, the national president conveys that information to members of the national board for discussion before implementation. Using this systematic approach to complaint management allows XYZ SLs to resolve complaints in a timely and professional manner. XYZ local chapter SLs listen to the customer and try to solve an issue before sending the complaint to the national level. Through active listening and engagement, local chapter SLs remain composed to discover emerging and innovative procedures toward resolving situations; using evidence collected or investigated before escalating the complaint. XYZ workforce,

customers, suppliers, partners, and collaborators can access complaint information as appropriate through one-on-one communication and shared files.

Results Triad: Workforce, Operations, and Results

Workforce

Workforce environment. Leaders at XZZ foster a productive and supportive workforce environment of initiative, creativity, accountability, responsiveness, encouragement, and collaboration. Chapter leaders receive training at the annual leadership retreat that builds on previous organizational knowledge and attains strategies and skills for performing their duties as a leader. The leaders at XYZ assess the capability of their all-volunteer workforce by implementing a chapter one-on-one evaluation process report. SLs review the evaluation to identify any issues, determine what works and what does not work, and identify any gaps in training. Furthermore, SLs decide if any of the information from a chapter one on one report can apply to other organizational branches and if so that information is conveyed through e-mail or a conference call.

XYZ leaders do not have a formal process that includes metrics for assessing the capability of their all-volunteer workforce. In assigning tasks, XYZ leaders consider the interest of the volunteer and provide the appropriate training. The volunteers' ability determines the capacity of the volunteer themselves and the number of programs and services performed or in operation. If capacity proves challenging, XYZ leaders will seek to recruit additional volunteers.

XYZ leaders drive the recruitment, selection and retention processes.

Organizational leaders recruit new volunteers (members) through local community

events, referrals from current volunteers, and informational meetings hosted by chapter leaders in various geographical areas. SLs recruit high caliber women who desire to improve the social disposition of underrepresented populations. The leaders at XYZ require new volunteers to complete an application at the local chapters. After a prospective volunteer completes their application at the local level (collegiate or professional), the application is then forwarded to the national headquarters for approval or disapproval along with the applicable processing fee. In addition to submitting a membership application, a prospective member must also provide various documents to include, a postsecondary diploma, an official college transcript or an official certificate of college/university enrollment and letters of recommendations (community-based, college/university, or professional based). Once approved to become a member of the organization, the member must complete the Rites of Passage Process (Figure 3).

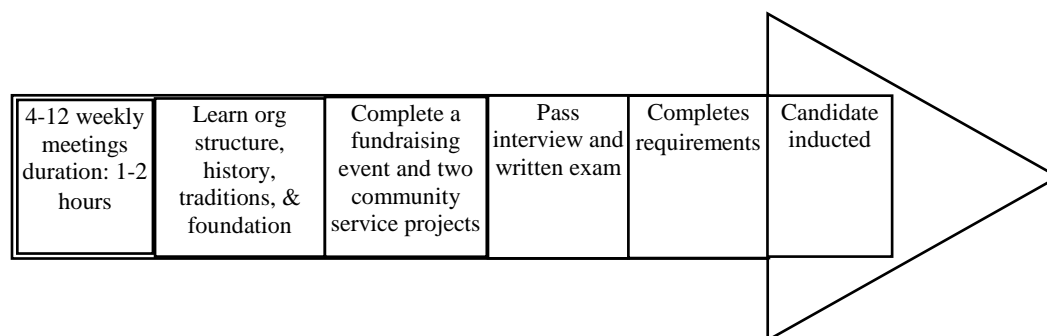


Figure 3. Rites of passage process.

After induction into the organization, members pay dues which range from \$20 per year to \$150 per year depending on the chapter. The XYZ Company leaders retain its workforce through collaboration, promoting skill-based tasks, appreciation and recognition programs, and inducting members who find the work

individually fulfilling. Once collegiate members graduate, they may advance to professional chapters of the organization.

The leaders at XYZ prepare the volunteers for changing capability and capacity needs by making sure all workers understand who the core leaders are and their assigned responsibilities, and how to report any changes through the chain of command system. Workforce members are significant stakeholders thus XYZ leaders impel a working environment of networking and collaboration with leaders, community organizations, and volunteers. Additionally, the training and support volunteers obtain enables leaders to coordinate volunteers' skills with organizational needs and capacity. Volunteers at XYZ use monthly chapter meeting information and event proposals to schedule their hours by reviewing planned services and activities. The XYZ local chapter leader monitors the schedule to ensure adequate support to meet the needs of planned services and activities. The number of services and activities determines the number of volunteers needed to perform the necessary tasks.

XYZ Company's SLs and BOD have instituted policies and procedures to ensure the health and security for its workforce members and participants. Each employee is in possession of the XYZ's Company policies and procedures handbook. SLs ensure that all locations for services are accessible, comply with the Americans with Disabilities Act policies, and accommodate persons with disabilities. XYZ leaders support the workforce with success via a two-way communication environment to identify gaps in processes and resolutions to challenges. Furthermore, leaders consistently convey appreciation to the

all-volunteer workforce, grant awards, as well as solicit their input on developing stronger working relationships.

Workforce engagement. Leaders at all levels strive to actively listen to the workforce members through multiple communication approaches in efforts of driving improvements to increase workforce performance, satisfaction, and engagement. The XYZ workforce comprises 100% of volunteers with no paid staff. SLs use a commitment to the MVV/guiding principles, core competency, collaboration, interaction with customers, and readiness to perform as a team and independently as key engagement drivers. The engagement process initiates during the member recruitment and selection process. XYZ Company SLs used communication and training with the workforce to foster open discussions and engagement and encourage explicit and tacit knowledge transfer. Cultural intelligence supported diverse ideas and perspectives in the multigenerational workforce. Chapter leaders regularly seek ideas and insight from members to contribute to XYZ's programs and services.

XYZ Company's engaged workforce originates from a culture of open communication and accountability. Training SLs at the annual leadership retreat on the culture of the organization was pertinent because collegiate chapter SLs are elected yearly, and professional chapter SLs are elected every 2 years. Using themes for the leadership retreat echoes what is vital to the organization. For example, last year's retreat theme was initiative, creativity, accountability, responsiveness, and encouragement (I Care).

The leaders at XYZ Company do not formally assess volunteer engagement; however, different metrics which shows involvement is present. The metrics encompass the tenure of the workforce, volunteer referral, the number of participating events, work accomplishments, and the passion for the work. The information posted by the webmistress on the XYZ Company website and various social media platforms depicted an enthusiastic and engaged workforce, which supported the results of workforce productivity and active customer engagement.

SLs used the annual leadership retreat and the biannual national conference to demonstrate learning and personal development to the workforce. To enhance new member's self-development, professional partners conduct seminars on various subjects such as finances and mental health in the African American community throughout the biannual national conference. Assigning tasks according to a member's capacity and capability provided SLs guidance with the workforce-development process. Short-term needs of the workforce were communicated and distributed in BOD and local chapter meetings, discussions, surveys, and the electronic one on one bimonthly chapter reports. SLs gleaned the various engagement metrics and informal organizational performance reviews to attain information on the needs of the workforce and how to better serve its customers.

XYZ SLs do not have an additional continuous leadership development program. The absence of a comprehensive leadership development program that includes mentoring and coaching could impact leaders' ability in recruiting new leaders, talent management and identifying long-term organizational needs, thus contributing to

organization knowledge lost and affecting a succession planning process. Participant 1 notes the lack of a comprehensive leadership development plan could threaten operational continuity.

There is no systematic approach to managing career progression at XYZ.

Volunteers may cite their volunteer experience gained from the XYZ Company on private, public, or government job applications as work experience. XYZ leaders provide any necessary support. Furthermore, when a BOD or SL vacancy becomes available, there will be an opportunity for qualified and interested staff members to apply for that position.

Operations

Work processes. The core competency of providing student-centered services to underrepresented populations allowed SLs of XYZ Company to build and develop key programs, services, and work process designs. The leaders of XYZ define their key services and programs through the XYZ's National Constitution. The focus on providing student-centered services to underrepresented populations that embody education, spirituality, leadership, and well-being derived through the PSS projects defined in the national constitution. The national constitution is a framework for all organizational leaders and staff. Chapter leaders along with members may determine what type of program or service to provide in their communities that align with the PSS. Any changes to the core PSS projects only occur by amending the national constitution.

To ensure all requirements for the organization are met, XYZ leaders divide daily operational work. The SLs of XYZ use a yearly Program Proposal template to ensure

they are fulfilling the requirements for the PSS properly. The leaders at each level are also aware that each proposal requires approval before implementing any program or service. Following the program implementation, leaders must submit a program report to verify that each section of the proposal matches with the report along with action shots of the event that is also a 501c requirement.

The leaders at XYZ improve their work processes by finding efficiencies in their workload but lack a system to detect these inefficiencies. XYZ leaders aim to lessen the duplication of efforts and routinely use BOD and chapter meetings, GroupMe, and Meetup to discuss work and to ensure each member understands their tasks, which supports accountability, knowledge creation, and knowledge transfer through socialization. The leaders of XYZ use a cloud-based drop box system to share and make files accessible to the workforce. SLs do not use a systematic approach to performance improvement. SLs manage for innovation through constantly assessing and modifying their programs and services. XYZ SLs established opportunities for improvement through the workforce, customers, participants, and stakeholder feedback. XYZ programs are ongoing. Therefore, the SLs may benefit from using the Real-Time Strategic Planning Cycle, the criteria, and adjusting the various programs while the programs are in operation not later down the road.

Operational effectiveness. XYZ SLs perform an annual review of financial revenue and expenses. SLs create the budget for the upcoming fiscal year for BOD approval based on the previous year data. XYZ uses donations from the community and membership dues and fees to operate which may fluctuate. Together, the BOD and SL

identify opportunities for improvement based on evidence from customer and stakeholder feedback. Contingent on the feedback results, it may become necessary for XYZ leaders to shift their focus to align with budget provisions.

The supply chain of XYZ consists of the website developers and the designers and printers of organizational paraphernalia merchandise. The supply chain of XYZ also includes florists who provide floral arrangements for various events. Collectively, SLs work with the BOD to identify qualified suppliers and vendors. Before contracts are signed, the BOD and SLs execute a vetting process and then vote. Vendors participated in face-to-face or electronic communication approaches to determine alignment with the XYZ Company's MVV and guiding principles. XYZ SLs sustain engagement with vendors who held prior working relationships with the workforce, partners, and stakeholders. To ensure that requirements are being met, SLs review vendor performance periodically. Outcomes become analyzed for continuous improvement and information sharing through face-to-face meetings, telephone, and electronic communication methods with vendors through regular scheduled or as-needed meetings.

SLs promoted a safe operating environment for all services provided by XYZ Company. Key customer and workforce requirements encompassed supporting and ensuring a safe and supportive environment for all participants, customers, and the workforce. XYZ SLs operate virtually. SLs maintain organizational documents as well as an emergency contact list of all their employees. A massive emergency or disaster that could impact the XYZ Company would be a loss of data. All leaders store the data on a cloud-based drop box system to help prevent data loss.

Measurement, Analysis, and Knowledge Management

Measurement, analysis, and improvement of organizational performance.

SLs do not incorporate Key Performance Indicators (KPIs) in evaluating XYZ daily operations and overall organizational performance. Each chapter leader collects information for the position (s) they oversee regarding performance with no set KPIs. Internally, the absence of using performance metrics could hamper SLs' ability to define, measure, monitor, and track its organizational performance over time, identify key long-term financial measures, and attain XYZ's stated organizational goals. Using KPIs in evaluating external data collected by SLs through e-mails and surveys could help in measuring organizational performance effectively. Furthermore, KPIs that reflect internal successes regarding performance may also become implemented for external promotional purposes, such as including the findings in XYZ's newsletters, or as promotional information on the organization website.

The leaders at XYZ rely upon stakeholder survey feedback and previous strategies in the decision-making process. In various circumstances, leaders' lacked evidence-based decision-making. Study Participant 1 noted the tenure of a leader affected their decision-making behaviors. XYZ SLs use the annual retreat, different committee meetings, and local chapter planning meetings to develop programs or services for the communities they serve. XYZ leaders use feedback from surveys they receive from customers and other stakeholders. SLs use feedback collected from the XYZ organization website and social media platforms. Leaders stay in tuned to social media platforms to

collect and monitor data and provide direct responses to customers and stakeholder compliments and complaints.

When XYZ leaders need rapid change, they reactively mobilize and motivate their all-volunteer workforce to come together and support. If funding is a problem, the leaders will endeavor to find other funding means such as donors. Loyal donors provide funds to the XYZ Company because they align with the organization's mission. The donors feel that XYZ leaders' actions are benefiting them, even if the benefit is shared collectively. In the event of a leader's sudden departure, often the position will remain vacant due to a lack of succession planning. Leaders will manage the expectations of their clients regarding what programs are justifiable or not justifiable. The leaders at XYZ review chapter activities through quarterly reports that include the PSS activities status, chapter accomplishments, membership status, and chapter or executive leadership concerns. Leaders also review the annual IRS 990 report.

Biannually, the BOD meets in person to review how well the directors have performed within their respective positions. An extension of the review is how the directors gauged the effectiveness and performance of the members they supervised. A significant concern for the SLs at XYZ is remaining stagnant and not experiencing future organizational growth. The BOD's informal reviews become informed through observations, bias, and no metrics. Operating without a systematic approach to measuring performance may constrain leaders' ability in recognizing staff job effectiveness, mobilizing organizational resources, collaborating effectively with partners, and stiffen organizational growth and innovation.

Information and knowledge management. XYZ SLs manage organizational knowledge and information through monthly reports, meeting minutes, proposals, websites, and social media. Merging these sources allow SLs the opportunity to share information with the workforce and XYZ stakeholders. SLs at XYZ verify and ensure the quality of their organizational data by compiling it themselves and reporting on it at BOD meetings.

Chapter leaders submitted event proposals for approval to the BOD. SLs communicated any adjustments via e-mail or telephone. Following the event, the chapter leaders presented a detailed electronic report of the event that included participant evaluations and photographs that matched the event. Participant feedback helped to identify the strengths and the weaknesses of a program.

Transferring relevant knowledge to stakeholders became demonstrated when SLs shared program information and feedback through e-mail, face-to-face meetings, conference calls, and on XYZ Company website and social media platforms. Additionally, information is available to customers and other stakeholders through the organization's newsletter and press releases. XYZ Company SLs, workforce, and stakeholders use the demonstrated mechanisms listed in Table 8 to ensure quality assurance, integrity, reliability, and validity as well as confidentiality and security of organizational data and information. XYZ SLs manage the cybersecurity of information systems and sensitive and privileged data and information.

Table 8

Data and Information Quality and Security

NPO's Resource Dependence	Number and Type of Streams (Sources)
Quality verification	Accountability
	Checks and balances
Integrity, reliability, and validity	Audits
	Checks and balances
	Code of ethics
	Standardization and consistency of software
Confidentiality and security	Anti-virus software
	Password protection for internal network security
	Security system protection for external security
	Protection of participant information
Currency	Secure web base e-mail
	Master calendar with due dates
	Data deadlines
	Audits

Using secured and user-friendly information technology systems enables SLs to share information and deploy data (Table 9). HostGator personnel manage network security. To further strengthen the network security measures, every 3 months each network user must change their passwords.

Table 9

Information Technology Systems

Secure System	Frequency	Stakeholders
XYZ Internal Network	On-going Real-time	W
Facebook	Real-time	S, P, SPC
Twitter	Real-time	S, P, SPC
Snapchat	Real-time	S, P, SPC
XYZ Website	Real time	W, S, P, SPC

Note. S=Student, P=Parent, W=Workforce, SPC=Suppliers, Partners, Collaborators

XYZ's service providers stay up-to-date on the latest software and hardware changes, which keeps the company up-to-date with software and hardware systems. The service provider conducts routine equipment assessments to ensure compliance of XYZ's network systems along with the emergency response, system maintenance, and data security. Throughout routine assessments, HostGator employees check the organization's network operating systems, servers, and devices for vulnerabilities to advert a security breach. Dependent on the assessment results, the service provider makes recommendations for system updates.

Safeguarding XYZ's network is essential to maintaining the organization's reputation and stakeholders. Safeguarding the system allows the workforce and all stakeholders to trust XYZ's leaders' ability to conduct business and do what is best for everyone. SLs ensured the security of the XYZ Company website while serving students, the workforce, partners, and collaborators efficiently. SLs used Facebook, Twitter, and

Snapchat to promote services and events, which are password-protected social media platforms.

Collection, Analysis, and Preparation of Results

Product and Process Results

XYZ Company is an award-winning organization that operates virtually (Table 10). XYZ Company SLs promoted the nonprofit organization as a student-centered, educational community service organization for African American women. The leaders of XYZ are continuously seeking to improve processes to serve the needs of their customers even though there is no systematic approach in place.

Table 10

Organization Awards

Year	XYZ Awards
2015	Boys and Girls Club-outstanding community service
2015	Beauty initiative
2016	Community service help her initiative
2016	Boys and Girls Club outstanding volunteer
2017	Women spirit of community awareness

XYZ SLs have influenced the lives of hundreds of students and parents and have operated XYZ Company for 27 years, with 5 as a NPO. In 2017, SLs and members presented programs and services to 950 students and parents in two states and one territory. Results were demonstrated by figures and tables, with the population of the customer as middle and high school girls and undergraduate women and parents participating in educational and development programs. XYZ Company SLs maintained a steady increase in customer enrollment within their programs and services (Figure 4).

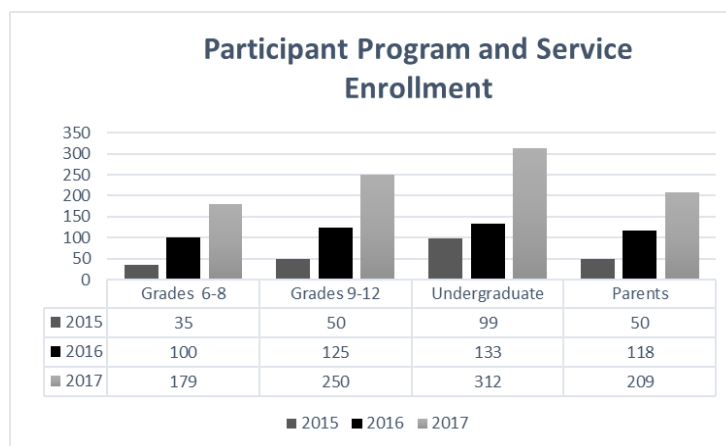


Figure 4. Participant program and service enrollment.

XYZ SLs provide programs and services that comprise developing young girls and women confidence, moral and educational guidance, building cultural and ethnic awareness, strengthening academic and life skills, and presenting exposure to academic and personal growth opportunities. SLs provided opportunities for the participants to visit various college campuses, social events, and mentoring sessions. SLs also offer opportunities for parents to become more involved in their children's education. XYZ's workforce encompasses customers; hence, it is vital for SLs to share feedback regularly regarding programs and services. SLs use the chain-of-command system (Figure 2). Using the chain-of-command system helps SLs establish a structure for customers, stakeholders, and collaborators to engage and determine a path of action in mediating a complaint. The chain of command structure proved effective, affording SLs with useful information deriving directly from the customer, stakeholder, or collaborator.

SLs of the XYZ Company dedicated themselves to improving the social disposition of underrepresented women through the three tenants of service, scholarship,

and sisterhood. SLs empowered young women by providing opportunities for empowerment, learning, tutoring, and community service. SLs provided tutoring and mentorship opportunities to hundreds of young women and presented opportunities for the young women to attend cultural and political events. SLs found success in collaborating with and attaining donations from civic and community organizations to further address and service the needs of underrepresented women.

XYZ SLs and the workforce of each collegiate and professional chapter hosted approximately 60 programs or services annually throughout different geographical regions. The programs or services embodied education, spirituality, leadership, and well-being. Through these programs and services, XYZ Company SLs provided the young women and parents with opportunities for networking, leadership, and personal growth.

XYZ SLs and workforce operate virtually. However, SLs promoted a safe operating environment for all services provided by XYZ Company. SLs maintained relationships with facility managers to ensure safe conditions when presenting their programs and services. Key customer and workforce requirements included supporting and ensuring a safe and supportive environment for all participants, customers, and the workforce.

XYZ Company SLs and the BOD work well with vendors. In supply chain management, SLs experienced success in using multiple vendors and collaborators across two states, along with fundraising projects. Through a review of different social media platform comments, existing relationships with vendors and collaborators proved

decisive. SLs were successful in acquiring needed resources to service underrepresented women in their servicing communities.

Customer Results

Understanding how customers and participants use XYZ services helps the organization leaders enhance and modify programs. Students and parents respond to survey questions that capture information that is fundamental in improving the participant's overall experience. Gathering data through program satisfaction data (Table 7) following each program and service conclusion assist SLs with developing and modifying programs and services. Data and information from surveys become shared in monthly national and local chapter meetings.

SLs segment overall participant satisfaction outcomes by grade level (Figure 6) and parent participation in programs and services. Results from the past 3 years signify that an average of 90% of undergraduate participants is most satisfied with XYZ's programs and services. Leaders also monitor web-based communication and social media sites for customer feedback, which proved positive for participant satisfaction, with posts originating from the program participants.

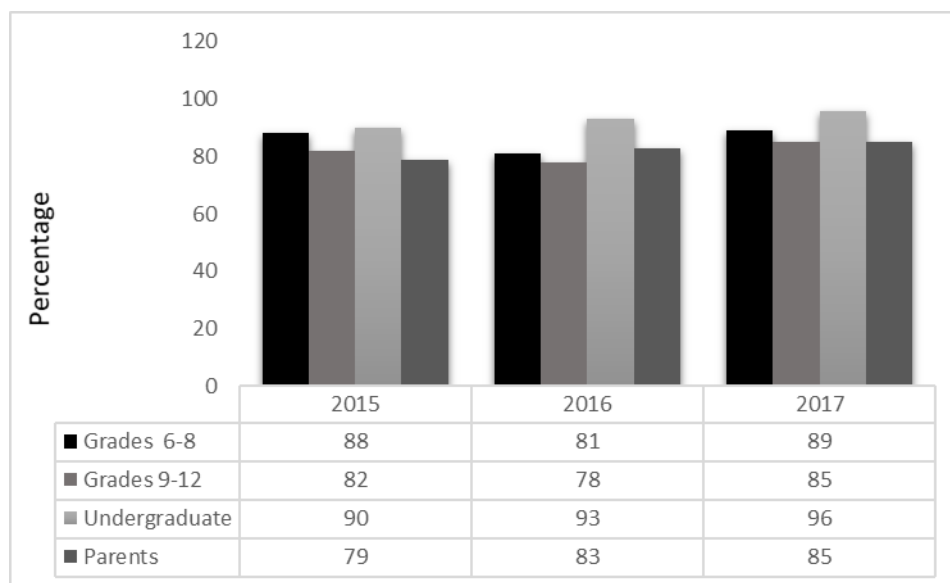


Figure 5. Participant satisfaction levels.

SLs XYZ SLs and employees interacted with all participants throughout learning activities, programming enhancements, and supported opportunities that could impact their academic, social, and professional lives. The XYZ Company SLs' goal is to reach 100% participant and parent engagement. XYZ SLs use web-based technology and social media to engage their students, parents, and stakeholders.

Each collegiate and professional chapter encompass their web-page and social media page. Leaders share information on XYZ websites and social media channels to enhance customer engagement. As identified in (Table 11), over the past four years, XYZ Facebook likes increased. The number of likes has increased yearly 1,203 to 3,988 existing likes. The number of Twitter views/tweets has amplified over the past 4 years to the recent sum of 7,510 views and 28,294 tweets. Instagram posts are also on the rise for

XYZ. Furthermore, engaging customers and stakeholders through Snapchat is increasing.

Table 11

<i>Social Media/web-based Engagement Tools</i>				
	2015	2016	2017	2018
Facebook Likes	1,203	2,000	2,654	3,988
Twitter Views/Tweets	3,922/13,689	5,045/15,084	5,322/18,117	7,510/28,294
Instagram Posts	1,404	3,300	7,905	8,665
Snapchat/Snaps	X	1,600	2,756	3,511

A webmistress and SLs monitor XYZ's website and social media accounts continuously. SLs review data, comments, and information obtained from the organization website and social media accounts. The leaders' review of data and information helped to increase customer and stakeholder engagement.

Workforce Results

XYZ SLs maintained a consistent all-woman workforce. Collegiate chapter leaders are elected every year, and professional chapter leaders are elected every 2 years. Leaders are selected internally rather than externally. Each SL had received a bachelor's degree, with some encompassing master's degrees and a doctoral degree. The diverse educational backgrounds among the SLs, including educators and training specialists, helped in providing solutions to participating students' academic challenges and facilitated a climate focused on adhering to the mission, vision, guiding principles, and core competency of the XYZ Company. The readiness and academic accomplishments of SLs reinforced XYZ workforce structure. Each study participant acknowledged the

absence of a formal process that includes metrics for measuring the capability of their all-volunteer workforce. In assigning tasks, XYZ leaders consider the interest of the volunteer. In efforts of developing a skilled workforce, SLs provided the appropriate training, which buttressed knowledge creation, and knowledge transfer. SLs improve their work processes by finding efficiencies in their workload but lack a system to identify these inefficiencies.

Recruitment and retention of new volunteers further reinforced XYZ workforce structure. Recruiting current volunteers into leadership positions remains challenging. Leaders recruit new volunteers/members who desire to improve the social disposition of underrepresented populations by engaging in local community events, attaining referrals from current volunteers and hosting informational chapter meetings in various geographical areas. Additionally, XYZ leaders use the organization's social media platforms to engage current and future volunteers. The overall membership growth rate shows improvement from 2007-2018 (Figure 6).

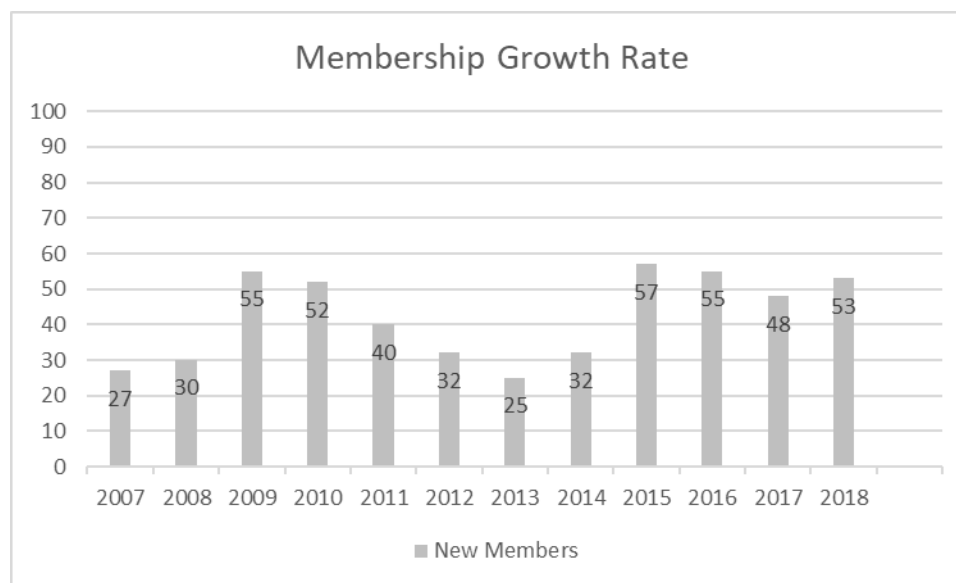


Figure 6. Membership growth rate by year.

Between 2008 to 2009 and 2014-2015, XYZ membership rate showed steady growth because of various recruitment activities at high school and college/university campuses and a vigorous marketing campaign. The rate of membership growth declined between 2009 to 2013. A lack of recruitment and marketing contributed to the decrease.

SLs were moderately successful in retaining collegiate members postgraduation. Once collegiate members graduated, some advanced to professional chapters of the organization. Data obtained from XYZ leaders indicate 20% of the multigenerational volunteer workforce are college students. Figure 7 illustrates the analysis of the workforce age demographics.

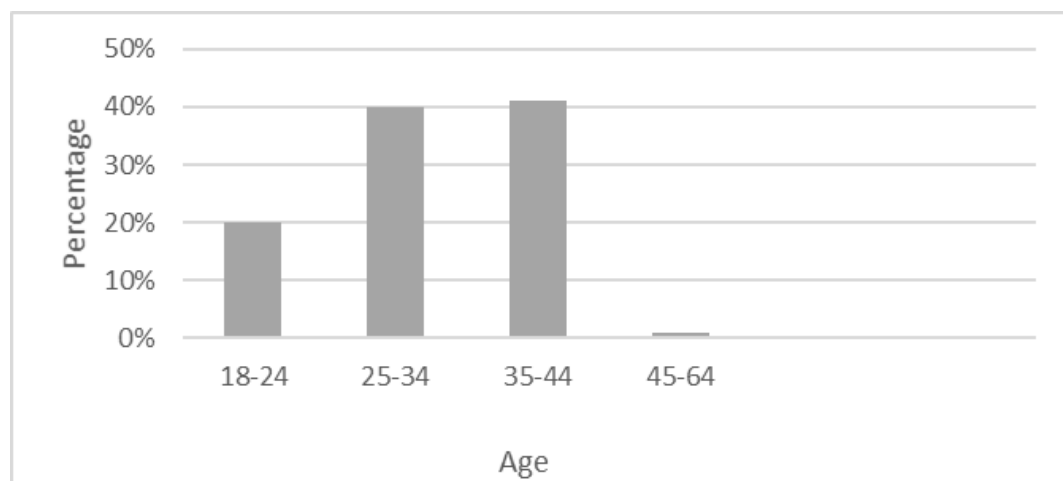


Figure 7. Workforce demographic by age.

The leaders at XYZ Company do not formally assess volunteer engagement. However, different metrics which show involvement does occur. The metrics encompass the tenure of the volunteer workforce (Figure 8) excluding SLs, volunteer referral, the number of participating events, and work accomplishments.

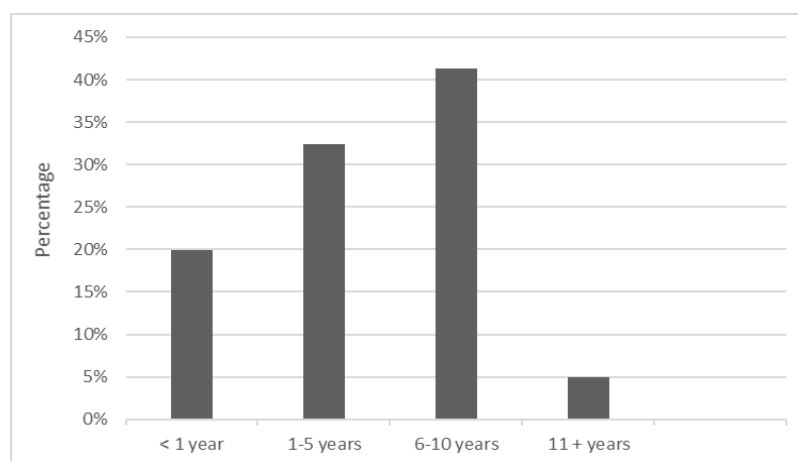


Figure 8. Tenure of volunteer workforce (percent).

SLs engaged with the workforce throughout the annual leadership retreat, and the biannual national conference to enhance new member self-development and promote

organizational knowledge. XYZ SLs lacked continuous leadership development programs. The absence of a comprehensive leadership development program that includes mentoring and coaching could impact leaders' ability in recruiting new leaders, talent management, and recognizing the organization's long-term needs. Additionally, the absence of a comprehensive leadership development program could affect organization knowledge lost, the development of succession planning strategies, and operational continuity.

Leadership and Governance Results

SLs makeup 7.9% of the XYZs Company workforce (Figure 1). The leadership of XYZ comprise six elected board members and 34 presidents and vice presidents of 17 collegiate and professional chapters. SLs engage often with each other with the BOD, and with the community. Each SL expend 15-20 hours weekly fulfilling the educational and social needs of students and parents in servicing communities.

The multigenerational BOD and leaders experienced challenges in communication because of varying perspectives on how to accomplish the needs of the organization. The absence of a strategic plan may limit leaders' ability to empower the community through educational and social services. All study participants acknowledged the need for a strategic planning process. Participants 1 and 2 noted ineffective communication between leaders is an overarching challenge and prioritizing succession planning is a necessity to expand and develop a cadre of qualified leaders for continuous mission fulfillment. Additionally, participants acknowledged a formal leadership development program does not exist whereas current leaders recognize volunteers who

encompass leadership potential as well as present the opportunity for mentoring and coaching to prepare possible successors to attain leadership experience. Participant 3 noted a leaders' transition occurs informally. During the transition, a current board member will transfer all organizational documents and answer any questions. Participant 1 noted consistent engagement and understanding what a potential leader required to perceive their roles and responsibilities might facilitate improvement in the passing of the leadership baton.

XYZ Company is subject to an annual audit and must meet compliance regulations set by the IRS for nonprofit entities and to sustain as a nonprofit in good standing. A certified public accountant conducts annual financial audits. However, the client did not provide the results of the audits and they are not available on the organization's nor public websites. XYZ Company CEO must annually register the nonprofit with the state. Each member of the organization is bound to the legal and ethical guidelines in the organization's National Constitution. The company has not encountered any legal or ethical issues from employees since its inception in 2013 as a nonprofit. The organizational leaders and workforce function in a transparent manner in all their actions to ensure they achieve XYZ's mission.

XYZ leaders and workforce make a substantial societal impact by cultivating the lives of underrepresented individuals through service, scholarship, and empowerment. Service is a primary tenet of the organization and developing each program or service, SLs place high regards for the customers, employees, and the community. XYZ leaders and employees volunteer for local nonprofits in their geographical regions, and they

encompass additional opportunities to become positive difference makers in society. Company leaders and employees aim to establish and maintain significant long-term stakeholder relationships by exploring approaches to influence customers and volunteers positively. XYZ leaders consider customer experience and feedback in determining program and service success outcomes. Following the conclusion of each program or service, XYZ leaders and staff request participant feedback through a survey (Table 7). Leaders and employees depend on stakeholder testimonials and reviews to fulfill its societal responsibilities in support of its key communities. One pertinent societal responsibility for XYZ leaders and the staff is to graduate students and transform their lives by taking them from possible high school and college dropouts to graduates.

To increase societal responsibilities and further support key communities, XYZ Company leaders and staff use social media/ web-based engagement tools (Table 11) to engage volunteers and other stakeholders. The social media website provides information on program and service offerings and internal organizational accomplishments. Furthermore, leaders use the website and chapter social media sites to highlight volunteers, community collaborators, and partners.

XYZ board members and SLs conduct meetings with chapter leaders and employees to discuss feedback, performance, and actionable information to improve company operations. However, XYZ leaders lacked a formal performance measurement tool. The absence of a formal performance measurement tool hinders SLs in evaluating the company's daily activities and overall organizational performance.

Financial and Market Results

XYZ leaders operate the company with limited financial resources from membership dues and fees which varies, and donors. A focus of the BOD is to support the development and implementation of a budget with SLs. Leaders create the budget for the forthcoming fiscal year for BOD approval based on the previous year data. The treasurer monitors and tracks budgetary data to allocate resources. Based on program and service feedback from customers and stakeholders, XYZ leaders may shift their focus to align with budget provisions. XYZ leaders offer their programs and services to customers free. A review of information shared by Participant 1 indicated maintaining budgetary flexibility as well as fiscal alignment was essential. Figure 9 illustrates a summary of XYZ's revenue and expenses from FY 2014-2017

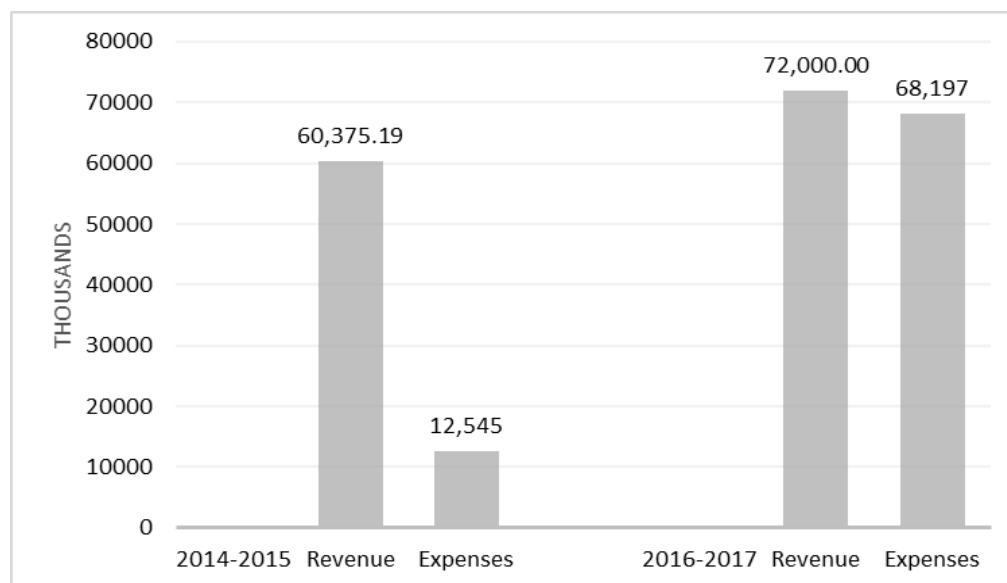


Figure 9. XYZ's revenue and expenses, FY 2014-2017.

XYZ leaders operate the organization with limited financial resources from membership dues, fees, and loyal donors. Figure 10 depicts a comparison of XYZ revenue to other NPOs in the founding state. XYZ revenue represents 24% of educational community service organizations operating with revenue between \$0 and \$100,000.

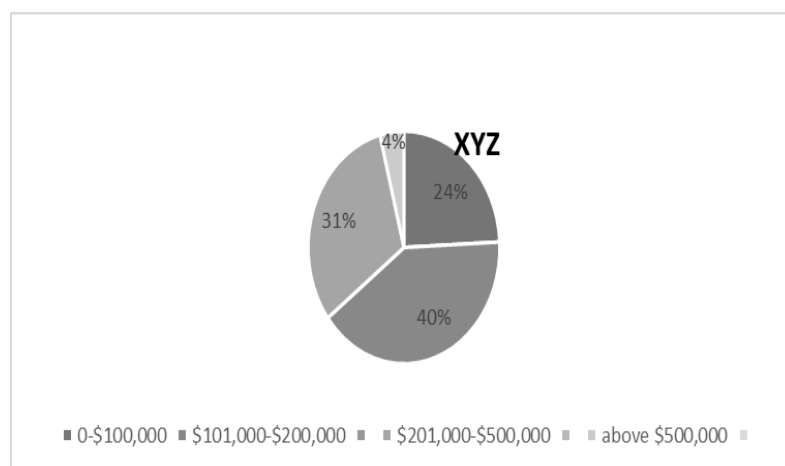


Figure 10. XYZ's comparison of revenue percent to nonprofit educational providers.

Key Themes

Process strengths. XYZ leader's process strengths encompassed two-way communication with the all-volunteer workforce, the recognition of volunteers and the engagement of volunteers. These process strengths are important dynamics of knowledge management. XYZ leaders communicate with their multigenerational workforce via multiple channels that include face-to-face meetings, phone conversations, print correspondence, and electronic methods of communication. Sanner-Stiehr and Vandermause (2017) expressed leaders' implementing various communication models in a multigenerational workplace facilitates effective communication among employees of

different ages. Klenke (2018) noted leaders using electronic communication in different aspects impacted the way knowledge became transferred. The leaders began communicating with volunteers during the recruitment process. Throughout this process, leaders communicate the expectations of volunteers and determine the interest of the volunteer.

Recognition of the volunteers is another leaders' process strength. When organizational leaders recognize and reward workforce member's achievements, the individual attaining the acknowledgment become more empowered, motivated, and committed to the organization (Nnambooze & Parumasur, 2016). XYZ leaders use employees' birthdays, college graduations, chapter meetings, as well as annual and biannual retreats to recognize their volunteers.

Work engagement reference persons who are persistent, vigorous, and feel invested in their work and organization (Nolan, 2015). The leaders of XYZ initiate the engagement process during the volunteer recruitment and selection process. The interview process starts to build the relationship between the leaders and the volunteers and supports the leaders in establishing the most suitable projects for the volunteers. SLs use a commitment to the mission, values, and guiding principles as key engagement drivers. Further process strengths for XYZ leaders encompass implementing social media platforms and chapter websites as marketing tools to capture potential volunteers and notify stakeholders of organizational activities.

Process opportunities. Following the analysis of semistructured interviews, financial statements, meeting notes, customer demographic files, and XYZ Company

website, the process opportunities for improvement identified are (a) strategic planning with measurable goals, (b) formal training for volunteers, (c) formal leadership development planning, (d) a systematic approach for performance improvement, and (e) developing succession planning strategies.

The lack of a systematic process to strategic planning may constrain leaders' ability to partner successfully with organizations dedicated to empowering lives through educational and social services to attain common goals and objectives. XYZ leaders operate from a reactive management stance relying on the status quo to combat challenges leveled toward disrupting organizational sustainability. All study participants confirmed the need for a strategic planning process. When leaders execute a formal strategic plan, it affords opportunities to identify proactive approaches, guide the decision-making process to sustain continuity, and enhance the quality of services provided to improve sustainability where fluctuating or limited funding is present (Gilliam et al., 2017).

A formal process of determining the capability of their all-volunteer workforce may allow XYZ leaders the opportunity to identify effectively any gaps in training. The absence of volunteer capability data may contribute to underuse resources in efforts of achieving the MVV and volunteer developing opportunities. Ogliastrri et al. (2016) reported strategies to enhance volunteer capabilities strengthen not only the organization but also the capacity of individuals. XYZ leaders noted a formal process that includes metrics for assessing the capability of their all-volunteer workforce does not exist. Developing a precise method for determining workforce

capability through performance metrics may provide XYZ leaders with strategies to improve leadership succession planning.

Although leaders served within the all-volunteer organization before becoming elected leaders, the transition process included limited training. All study participants acknowledged the absence of a formal leadership development plan. The lack of a comprehensive leadership development program that includes mentoring and coaching may constrain leaders' ability to meet future organizational needs, manage talent, and identify current and future leaders, therefore, affecting a succession planning process. Ballaro and Polk (2017) purported ongoing leadership development, and talent management were critical components of succession planning to meet the future leadership needs of the organization. XYZ leaders attain leadership training during the annual leadership retreat and the biannual national conference.

The CEO provides performance feedback to SLs regarding the relative effectiveness of board actions as they affect the organization. Study Participant 1 asserted there is no formal process for evaluating performance improvements. Creating and implementing a formal process for performance improvements will provide an opportunity for XYZ leader to outline and analyze their performance. The examination will afford XYZ leaders an opportunity to evaluate if their performance improvement methods are working or not working.

Many criteria influence succession planning such as strategic planning with measurable goals, employee training, leadership development, and approaches for

performance improvement. XYZ's BOD is responsible for organizational policies and governance that includes succession planning to ensure SLs and members are adhering to all guidelines and functioning in their roles effectively and attaining the necessary training. Constructing leadership development plans and executing strategic initiatives impacted the BOD's responsibility positively when ensuring the required structures and processes were implemented to satisfy the strategic needs of the organization (Hooijberg & Lane, 2016). A lack of effective communication between BOD members posited adverse effects on planning for succession. Stewart (2017) proposed that when leaders plan for succession, systemic inefficiencies lessen, and the succession planning process helps leaders maintain the continuity of their business operations. Participant 1 noted a lack of board engagement on prioritizing succession planning impeded succession discussions and hindered board recruitment. Participants 2 and 3 noted uncooperative leaders and unproductive dialogue were inhibiting factors in not planning for succession. Hence, succession planning strategies for XYZ Company does not exist. XYZ leaders can prepare for succession by developing strategies for effective communication, initiate volunteer training, focus on leader accountability at the annual leadership conference, and develop a concise plan for the path of the organization with measurable goals to maintain leadership sustainability.

Results strengths. A result strength of XYZ leaders included the ability to increase the number of customers enrolled in offered programs or services (Figure 4). XYZ's customer base included middle and high school girls, undergraduate college women, and parents participating in educational and development programs.

A data evaluation on educational community service providers and advocates reinforce XYZ's company core competency, the mission, vision, and guiding principles, and the leader's dedication in improving the social disposition of underrepresented populations, indicating a commitment to societal well-being. XYZ leaders primarily funded the organization through membership dues and fees. Leaders of XYZ held limited fundraisers in the various servicing areas; however, the breakdown of funds expended or raised was not available.

A review of XYZ Company social media platforms presented an understanding of how leaders and their workforce connected and engaged with each other, customers, and all stakeholders. As depicted in (Table 11), engagement using the various social media platforms increased from 2015-2018. The leaders of XYZ also realized an increase in their overall volunteer workforce from 2007 to 2018 totaling 506 active volunteers (see Figure 6). The executive directress celebrated her fifth anniversary in 2018, and in the same year, the assistant directress of administration and the directress of correspondence celebrated their third anniversary which speaks to the leadership tenure of the all-volunteer workforce.

Results opportunities. Although XYZ SLs increased customer enrollment in their programs and services (Figure 4), a need exists for leadership recruitment and development. To expand volunteer leadership recruitment and development, XYZ leaders should contemplate recruiting and identifying future leaders in their customer base. XYZ's customer base includes undergraduate college women and results from XYZ's Participant satisfaction survey (Figure 5) indicate that an average of 90% of

undergraduate women is most satisfied with the organization's programs and services. Participant 1 noted upon a leadership vacancy, leaders manage the absent leaders' responsibilities by dividing them between current leaders. Henceforth, distressing the leadership pipeline to meet future organizational needs. Edmonds (2016) expressed a lack of leadership recruitment and leadership training leaves the organization vulnerable to sustainability threats. Chiocchio and Gharibpour (2017) suggested leadership development was a likely approach to recognize and prepare a successor. Eliades et al. (2017) purported current leaders should identify individuals who personify leadership potential and provide training and support to prepare them for leadership positions thus leading to a cadre of qualified leaders for the succession planning process.

XYZ leaders should increase stakeholder alignment with their PSS services available to members of underrepresented communities. Bish and Becker (2016) purported it is an expectancy for NPO leaders to align and build strategic partnerships outside of the organization to become more innovative and sustainable. Throughout 2018, leaders conducted numerous fundraising projects that included limited community stakeholders. However, data were not available to support the cost outlay, the amount of money generated, specific deliverables or how many people participated. Implementing KPIs would allow XYZ leaders to remain connected to their cause by monitoring financial data to depict gains and losses and track and evaluate fundraising projects to determine their effectiveness.

XYZ's social media results illustrate SL's capacity to engage its various stakeholders including its workforce. Although XYZ is a virtual organization that encompasses chapters in multiple geographical regions, social media usage is instrumental in reaching potential new organizational leaders and stakeholders. Leaders can post company events and provide rapid responses to inquiries. XYZ SLs should contemplate implementing strategies to retain college volunteers after graduation instead of hoping they will transfer to a professional chapter of the organization. Participant 1 expressed a defined retention strategy is not available. Kim et al. (2016) posited a retention strategy aligning with the organization's strategic plan that includes employee training and opportunities for job advancement have a positive influence on retaining employees.

Lastly, XYZ leaders' fiscal reports indicate the company functions with fluctuating nominal funding. SLs should consider increasing grant research to acquire new and pertinent funding resources to support their MVV. Maier et al. (2016) posed diversified funding may prevent mission drift in NPOs and enhance the provision of programs and services.

Project Summary

Succession planning is valuable to an organization regarding expansion for both short-term and long-term leadership continuity and as a significant contributor to the sustainability of an all-volunteer NPO. Leadership recruitment, retention, and development of leaders are challenges that must be overcome to sustain leader readiness for future organizational growth. Van Dusen (2015) imparted leadership voids overburden present leaders and adversely affects talent retention because of a

lack of training and limited advancement opportunities. Thus, Bozer et al. (2015) concluded nonprofit leaders that deliberately and systematically exert efforts to recruit, retain, and develop employees not only increase and retain knowledge capital but also experience more success in developing and implementing succession planning strategies which support organizational capacity for long-term sustainability.

In this study, I evaluated several engagement strategies XYZ leaders use to recruit, retain, and develop potential leaders to prepare for an organizational change process. A leaders' ability to maintain trust and effective communication was crucial factors in engaging employees and increasing the sustainability of the organization. Cai et al. (2018) posited for successful change; leaders must be interactive, and trustworthy.

The participants in this study contributed pertinent information for a short-term action plan and provided awareness on areas necessitating improvement to recruit, retain, and develop volunteers for leadership changes. The outcomes of this study provided evidence requiring leaders to implement strategic planning, formal training for volunteers, leadership development activities, performance evaluations, and funding strategies. I did not identify any succession planning strategies; however, data analysis provided information on organizational leadership, strategy, customers, measurement, analysis, and knowledge management, workforce, and operations for an all-volunteer nonprofit educational community service organization. Leaders of other NPOs that rely on an all-volunteer workforce to

achieve its mission may benefit from the strategies and recommendations identified in this study to recruit, engage, and retain volunteers for leadership succession. The implication for social change from the findings of this study may contribute to strengthening distressed communities through the impact of sustainable educational community service nonprofits that are proficient, organized, and have leadership continuity.

Contributions and Recommendations

Nonprofit leaders' transition whether planned or unplanned; nevertheless, some nonprofit leaders lack strategies to develop succession plans. Recruiting, retaining, and developing employees contribute to organizational sustainability and mission fulfillment. This study provided XYZ leaders with strategies to plan for succession and meet the needs of individuals in underrepresented populations. In a review of survey data and other company documents, XYZ leaders operating with fluctuating limited funding met the needs of 950 individuals during 2017 throughout various geographical locations.

The implementation of a formal strategic plan with measurable goals will provide XYZ leaders opportunities to improve developing succession planning strategies and improve sustainability. I recommend XYZ leaders adhere to the upcoming annual national leadership retreat agenda that includes establishing a formal strategic plan with input from employees. Furthermore, I suggest leaders of XYZ implement BOD training that emphasizes knowledge sharing, relationship building, accountability, and effective communication practices to build board

cohesiveness. Data gathered from XYZ leaders interviews as well as organization documentations showed a deficiency in BOD training to support strategic planning. Therefore, diminishing opportunities to recruit new leaders and to operate at optimal capacity in steering the organization forward.

XYZ leaders execute proficient approaches through various social media platforms and workforce activities in engaging and maintaining positive relationships with volunteers. I recommend that XYZ leaders implement an automated survey to evaluate volunteer's job satisfaction levels. A computerized survey used by XYZ leaders can prove beneficial in providing insight into a multigenerational workforce that includes employee identification and commitment, whether autonomy or teamwork is preferred, leader support levels, and training delivery preferences. Additionally, implementing formal training for volunteers with performance metrics will provide XYZ leaders with knowledge of any training gaps, increase volunteer capabilities, and help leaders in identifying future organizational leaders.

Although leaders of XYZ attained training at the annual leadership conference, implementing a formal leadership development plan will empower XYZ leaders in adverting a leadership gap and provide leadership continuity. Formalizing a leadership development process, XYZ leaders can cultivate and develop future leaders and build an organization that responds to change. Throughout leadership development and training activities, XYZ leaders can transfer explicit and tacit knowledge through mentoring and coaching to prepare current and potential leaders. Additionally, talent management functions such as recruitment, assessments, performance management, career preparation,

and succession planning are essential elements in a systematic leadership development program.

Developing a systematic approach for performance improvement will provide leaders of XYZ with opportunities to collaborate more effectively with partners. Furthermore, leaders will have the opportunities to mobilize organizational resources and operate more fluidly. Though the leaders of XYZ receive performance information regularly, integrating metrics to set goals and targets, collect data, and analyze data, may facilitate leaders' decisions to improve policies, programs, and outcomes.

XYZ leaders present their programs and services at no cost to customers and operate with limited funding from membership dues, fees, and donations from civic and community patrons. XYZ Company receives no government funding. I recommend the leaders of XYZ expand funding prospects through grants and increased fundraising events. XYZ volunteers obtain no monetary compensation for their expended hours of service responding to the needs of the community. Increased funding will allow XYZ leaders to expand its programs and services, enhance volunteer appreciation activities, and optimize investment in worker's development. An additional recommendation for leaders of XYZ is to update the organization's website and public websites to reflect recent financial data. Presenting financial data may facilitate the recruitment of new donors and provide transparency to current and future stakeholders. Qualitative researchers reviewing my single-case study may benefit from strategies identified and recommendations for nonprofit leaders who

rely on an all-volunteer multigenerational workforce. Conducting a case study design with multiple NPOs may provide further information on strategies leaders use to plan for succession. I recommend future researchers implement various conceptual lens for qualitative and quantitative research methods to identify additional strategies for succession planning. Qualitative and quantitative studies may provide an understanding of the strategy senior leaders in NPOs use to recruit, retain, and develop leaders for succession planning events. Another recommendation for future researchers includes exploring the tacit and explicit knowledge transfer strategies via mentoring in educational base NPOs. Throughout the literature, in a planned succession event, a mentoring relationship between the successor, and the incumbent was pertinent. However, the studies did not incorporate research conducted in educational base nonprofit environments involving a multigenerational workforce. The results of this study when disseminated within the academic and professional community may provide leaders with strategies on succession planning strategies to maintain not only leadership continuity but also organizational sustainability for future growth.

Section 4: Executive Summary of Key Themes

Project Summary

The purpose of this qualitative single-case study was to identify strategies nonprofit educational leaders use to plan for succession. As a participant in Walden University's consulting capstone, I worked with an assigned organization located in the southeastern United States with middle and high school girls, undergraduate women, and parental women as the customers. I used three executive leaders of the organization as the purposeful sample population for this study. The organization was educational based and had a core competency of empowering and educating women through service, scholarship, and sisterhood.

I used semistructured interviews with the client leader and two SLs of the client organization. Additionally, I reviewed public and internal data, social media platforms, the website of the NPO, and competitor sites to gain an understanding of the social and financial needs of the customers and community served. Data collected and analyzed resulted in the identification of four themes: process strengths, process opportunities, results strengths, and results opportunities.

Additionally, I provided leaders of the client organization with recommendations to assist in improving communication, attaining sustainable funding, and improving operational performance to meet the needs of the community. The results of this study supported the need for NPO leaders who rely on an all-volunteer workforce to research various available methods for raising funds; increasing and retaining donors; employing

effective communication approaches; and implementing strategies to recruit, retain, and develop future leaders to meet the organizations' current and future needs.

Contributions and Recommendations

The results I identified in this study demonstrate the reasons leaders should develop and implement effective succession planning strategies. The contributions to business practice include the analyzed data and information learned to enhance succession planning processes and KM. The contributions to social change include the client organization leaders learning additional strategies and methods that improve operational processes and overall performance to support their communities.

My recommendations for future implementation include succession planning strategies for BOD and other senior leaders. The lack of a succession planning strategy when board members and other key volunteer leaders depart the organization, whether voluntary or involuntary, may distress the leadership pipeline to meet future organizational needs. It is vital for XYZ leaders to implement a succession planning procedure that establishes a deliberate and precise process intended to identify, develop, and retain individuals that can execute the current and projected goals and objectives of the organization using their various leadership competencies. Additionally, I recommended implementing an active leadership recruiting and retention program and a KM system, which can help leaders' decision-making capabilities and stimulate a cultural change for innovation.

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Appendix: Interview Protocol

Interview Title: Exploring the Strategies Used by Nonprofit Leaders to Develop Succession Plans

1. The interview protocol begins.
2. I will introduce myself to the participant.
3. The participants of the study will have beforehand read the informed consent form and provided their consent via e-mail, agreeing to participate in this research.
4. I will thank the participant for his or her agreement to participate in this research study.
5. I will provide the participant with the information on how to withdraw from the study.
6. I will seek permission to digitally record the interview.
7. I will also provide information regarding the member checking process, which is after the transcript interpretation. I will schedule a time with each interview participant. During this time with the participants, they will review the analyzed data for the member checking process to assist with ensuring the reliability and validity of the data.
8. I will start the audio recorder, and note the date, time, and location of the interview. I will also have writing tools ready to take notes on the responses.

9. I will introduce the participant to his or her alphanumeric code for identification (i.e., Participant 1, Participant 2, Participant 3) on the audio recording and on a copy of the consent form.
10. I will begin the interview.
11. The interview will begin with Question #1 and will follow through to the final question.
12. I will conclude the interview sequence.
13. I will thank the participant for his or her time and participation in this study.
14. I will reiterate my contact information for follow up questions and any concerns from the participants.
15. The interview protocol ends.