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Building Long-Term Donor Relationships in Nonprofit Organizations Through Social Media

Debora Johnston
Walden University

Walden University

College of Management and Technology

This is to certify that the doctoral study by

Debora Johnston

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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

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Abstract

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MBA, University of Phoenix, 2006

BA, Grand Valley State University 2003

Consulting Capstone Study Submitted in Partial Fulfillment

of the Requirements for the Degree of

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Abstract

The purpose of this single case study was to explore the strategies that leaders of a nonprofit organization used to build long-term donor relationships through social media. Participants included a purposeful sample of 3 senior leaders of a small nonprofit organization in Southern California who demonstrated successful approaches to using social media to manage donor relations. The conceptual framework for this study was Hon and Grunig’s concept for measuring long-term organization–public relationships. Data were collected through semistructured interviews with organization leaders, review of publicly available organizational documents, and information including financial statements, strategic planning documents, organizational budgets, employee handbooks, and board manuals. Member checking and methodological triangulation were used to validate the findings. Data from organizational documents and interviews were manually coded, and themes were identified using content analysis. Five themes emerged related to process strengths and opportunities including leadership succession and performance evaluation, workforce capacity, revenue diversification, performance measurements and data collection, and the expansion of relationship management via social media. The findings from this study might contribute to positive social change by providing strategies for building long-term relationships with donors through social media and the supporting processes that nonprofit leaders can use to increase financial resources through a loyal donor community and enhance organizational sustainability.

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Dedication

I dedicate this study to my daughter and husband. Ellory, I am blessed beyond measure to be your mother. Bringing you into this world halfway through this journey only served as motivation and fueled my desire to complete this degree. I hope you always know how precious you are to me and that the possibilities are endless when you set your mind to something. I have no doubt that you will achieve great things. Nathan, if it weren’t for you by my side and your endless support, I would not be here, writing this dedication. Thank you for always believing in me and encouraging me to follow my dreams.

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Section 1: Foundation of the Study

In this study, I used the 2017-2018 Baldrige Excellence Framework to explore strategies that leaders of nonprofit organizations used to build long-term relationships with donors through social media. In this section, I provide the background of the problem, the problem statement, the purpose statement, nature of the study, research questions, and a brief overview of the conceptual framework used in this study as well as a review of the relevant scholarly literature.

Background of the Problem

Leaders of nonprofit organizations provide a range of essential services to promote the well-being of society (Paulin, Ferguson, Schattke, & Jost, 2014). The ability to foster and maintain relationships with donors and other stakeholder groups is a significant aspect of nonprofit management and organizational effectiveness (Svensson, Mahoney, & Hambrick, 2014). Due to an increase in competition for donor resources and a decrease in government support (Pressgrove & Pardun, 2016), nonprofit leaders must consider innovative strategies for working closely with potential supporters to acquire additional donations (Paulin et al., 2014).

Social media is an effective communication platform for reaching large numbers of stakeholders quickly and efficiently (Carboni & Maxwell, 2015). Nonprofit leaders can create social media accounts to interact and engage with the public for free or relatively low cost (Goldkind, 2015). However, nonprofit leaders must understand how to use social media for two-way engagement with stakeholder groups (Carboni & Maxwell, 2015). Although scholars have studied the best way to cultivate and maintain relationships via social media, findings remain inconclusive (Pressgrove & Pardun, 2016).

Problem Statement

Nonprofit leaders are facing increasing competition for donor resources due to the rising number of nonprofit organizations (Pressgrove & Pardun, 2016). Nonprofit organizations experience a reduction of 30% of repeat donors annually, and 50% of first-time donors do not donate a second time (Ramanath, 2016). The general business problem is that without adequate strategies for building long-term donor relationships, nonprofit leaders are unable to sustain a competitive advantage to retain donors required for obtaining valuable resources. The specific business problem is that some nonprofit leaders lack strategies for building long-term donor relationships through social media.

Purpose Statement

The purpose of this qualitative single case study was to explore the strategies nonprofit leaders used for building long-term donor relationships through social media. The targeted population for this study consisted of senior leaders from a nonprofit organization in Southern California who have successfully implemented social media strategies to build long-term donor relationships. The implications for positive social change are that the findings of this study may enable nonprofit leaders to secure donor resources for organizational sustainability to continue supporting communities and the public.

Nature of the Study

In this study, I used a qualitative research methodology. Researchers use qualitative methods to generate thick descriptions of the phenomena under study in a real context (Guercini, 2014). A qualitative method was suitable for this study because the goal was to generate a thick description of strategies that nonprofit leaders used to build long-term donor relationships through social media. In contrast, researchers use quantitative methods to explore the relationships or differences among variables (Ma, 2015) through a predetermined hypothesis (McCusker & Gunaydin, 2015), which was not suitable for the purpose of this study. Researchers use the mixed method to explore the research question including both quantitative and qualitative methods (McManamny, Sheen, Boyd, & Jennings, 2015). Thus, a quantitative or mixed method was not appropriate for this research because to address the specific business problem, I did not need to test one or more hypotheses.

When the intent is to explore or clarify understanding of an issue or phenomenon, researchers may use a case study design (Saunders, Lewis, & Thornhill, 2015). A case study was appropriate for this research because the goal of this study was to explore what strategies nonprofit leaders used for engaging donors and the public through social media. Researchers employ phenomenological designs in their studies when they explore a phenomenon from the viewpoint of individuals who have experienced the phenomenon first-hand to better understand the meaning of the experience (Matua, & Van Der Wal, 2015). However, summarizing the meaning of experiences of nonprofit leaders was not the purpose of this study, so a phenomenological research design was not appropriate. Additionally, ethnographic studies are suitable when the purpose of the research is to reveal the common elements of a culture (Wall, 2015), which was not appropriate because the intent was not to reveal the common elements of culture related to nonprofit leaders.

Research Question

What strategies do nonprofit leaders use to build long-term relationships with donors through social media?

Interview Questions

The interview questions for this study were:

1. What strategies do you use to build long-term relationships with donors through social media?
2. How would you describe the organization's social media interactions with its participants?
3. What are your key performance metrics for evaluating the effectiveness of your strategies to build long-term donor relationships through social media?
4. What tracking mechanisms do you use to monitor the content and frequency of social media communications with donors?
5. How do you engage with those whom you identify as regular participants on social media, including those who comment or like a post?
6. How, if at all, does the organization recognize repeat donors or other supporters of the organization? If any, what response did the organization senior leaders receive because of that recognition?
7. What more do you wish to say about how you build long-term relationships with donors through social media?

Conceptual Framework

The conceptual framework I used in this study is Hon and Grunig's (1999) concept for measuring long-term organization–public relationships. Hon and Grunig determined that organizational leaders need a mechanism for measuring the success of long-term relationships with their publics, which can be done using six key elements: control mutuality, satisfaction, commitment, trust, exchange relationship, and communal relationship. Hon and Grunig posited that the most effective organizational leaders select and achieve suitable goals because of the relationships they develop with their stakeholders. Furthermore, the researchers posited that leaders who engage in two-way communication processes that benefit both parties are more successful in building relationships.

According to Hon and Grunig (1999), a communal relationship exists when one party provides a benefit to the other, motivated by concern for the welfare of the other, even if he or she get nothing in return. This type of relationship is comparable to donors making contributions to nonprofit organizations to benefit others. Communal relationships are desirable among nonprofits because they are critical to achieving organizational outcomes and promoting social responsibility (Hon & Grunig, 1999). Hon and Grunig recognized that organizational leaders may need to build communal relationships before an exchange can occur, such as donations, volunteerism, or fundraising. Hon and Grunig's concept of organization–public relationships was an appropriate lens through which to explore nonprofit leaders' social media practices and how those practices build long-term relationships with their donors.

Operational Definitions

Facebook: Facebook is an Internet-based, two-way communication tool with the capacity to enable interactions among users through the sharing of user-generated content in various form including text, audio, and video files (Goldkind, 2015).

Instagram: A specialized social networking platform that enables users to share user-generated content in the form of photographs (Goldkind, 2015).

Organization–public relationship: A relationship that exists between the individuals of an organization and the individuals of the public in which the actions of either party can positively or negatively impact the well-being of the other (Ledingham & Bruning (1998, p. 62).

Social media: Internet-based communication technology that individuals use to create and exchange content while establishing relationships, groups, conversations, and reputations (Khan, Hoffman, & Misztur, 2014). Social media consists of social networking sites such as Facebook, blogs and microblogs such as Twitter, and video-sharing sites and other content communities.

Twitter: A short message service or microblogging communication tool in which an individual can generate and exchange content as well as network and interact with others by sharing or republishing other individuals' information (Park, Reber, & Chon, 2016).

Two-way symmetrical communication: A communication model characterized by dialogues in which no clear distinction between the sender and receiver exists because both individuals exchange information (Li & Li, 2014).

Assumptions, Limitations, and Delimitations

The following is a summary of the assumptions, limitations, and delimitations of my study. A discussion of these reflections reminds the reader of the boundaries of the study, the specific context, and how the findings may or may not contribute to understanding (Marshall & Rossman, 2016).

Assumptions

Assumptions are the characteristics of a study that the researcher accepts as true but cannot prove (Leedy & Ormrod, 2013). It was my assumption that the participants in this study provided honest, transparent, and detailed responses to all interview questions. I also assumed that an interview guide with follow up questions ensured the breadth, depth, and scope of information received. Third, it was my assumption that I collected enough data using the semistructured interview questions and organizational documents to answer the central research question.

Limitations

Limitations are potential weaknesses, out of the control of the researcher, that may impact the outcome of the study (Leedy & Ormrod, 2013). A limitation of this study was that it included the experiences of senior leaders from only one nonprofit organization in Southern California and did not include other geographic regions of the United States. The use of a case study research design with a small sample size may also limit the generalizability of the findings (Marshall & Rossman, 2016). However, the goal of this case study was to generate diverse perspectives unique to the population, so I did not need to generalize the findings of this study.

Delimitations

Delimitations refer to the restrictions of the study that the researcher executes to narrow the scope of the study (Marshall & Rossman, 2016). The delimitations of this study included the (a) population comprising senior leaders from one nonprofit organization, (b) geographical location in Southern California, and (c) sample size of three senior leaders.

Significance of the Study

Leaders of nonprofit organizations provide necessary services to the communities in which they serve and need strategies for securing resources to fulfill the mission. Therefore, it is important for nonprofit leaders to seek new methods for building relationships with donors and engaging them with the mission of the organization. This study may have significance to business practice because the findings may support nonprofit leaders in building long-term donor relationships through social media.

The implications for positive social change are that findings of this study may enable nonprofit leaders to secure valuable resources for organizational sustainability. Facilitating the operation of nonprofit organizations may further benefit the communities that they serve through continued mission fulfillment. Members of society benefit when community members receive necessary critical services from nonprofit organizations.

A Review of the Professional and Academic Literature

The purpose of this qualitative single case study was to explore the strategies that nonprofit leaders used for building long-term donor relationships through social media, which is a significant aspect of nonprofit management and organizational effectiveness

(Svensson et al., 2014). Social media is a communication platform for reaching large numbers of stakeholders (Carboni & Maxwell, 2015) for nonprofit organizations with limited financial resources (Goldkind, 2015). However, simply owning a social media account does not lead to two-way engagement with stakeholder groups (Carboni & Maxwell, 2015). Although scholars have studied the best way to cultivate and maintain relationships via social media within a nonprofit context, findings of these studies remain inconclusive (Pressgrove & Pardun, 2016).

In the literature review, I begin with a discussion of the primary conceptual framework used in this study: Hon and Grunig's (1999) concept for measuring long-term organization–public relationships. I then provide an analysis of supporting and contrasting conceptual frameworks. To understand how social media as a relationship management tool can affect the sustainability of a nonprofit organization, it is significant to examine the topics derived from the literature including social media use in nonprofit organizations, challenges of using social media, and the positive and negative implications of social media use. I then conclude the literature review with a discussion about how these topics support the elements of the research question and methodology of this study.

In this literature review, I used academic journals devoted to informing the nonprofit sector. The objective of my literature search was to identify and critically analyze existing scholarly works and studies relating to building long-term donor relationships using social media in nonprofit organizations. I provide a comprehensive discussion of the themes revealed in the research about relationship building in nonprofit organizations and social media. Each of these themes contributed to the discussion of building long-term donor relationships in nonprofit organizations through social media and the need for further research about social media use in nonprofits.

The terms used to search the databases included *nonprofit organizations, relationship management, social media, fundraising, stewardship, donor relationships, agency theory,* and *organization–public relationships*. The primary source used to obtain documents for the literature review was the Walden University online library. I acquired documents using research databases including ProQuest, Business Source Complete, and Sage Premier. In the literature review I included examination of 102 total sources, comprising peer-reviewed articles, texts, and online resources. Among the 102 total sources referenced in the literature review, 87% were published between 2015 and 2019. Additionally, 89% of the total sources I referenced in the literature review were peer-reviewed (Table 1).

Table 1

Professional and Academic 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	1	0	0%
Peer-reviewed articles	100	89	89%
Online resources	1	0	0%
Total	102	89	87%

Organization–Public Relationships

The primary conceptual framework for this study was Hon and Grunig's (1999) concept for measuring long-term organization–public relationships. Ledingham and Bruning (1998) described the organization–public relationship as the condition that exists between the individuals of an organization and the individuals of the public in which the activities of either party have an impact on the welfare of the other. To gauge the quality of a relationship, Hon and Grunig ascertained that leaders could measure their organization's long-term relationships with their publics using six central components: control mutuality, satisfaction, commitment, trust, exchange relationship, and communal relationship.

Control mutuality represents the balance of power within the relationship. If one party has a dominating disposition, the other relational outcomes may suffer as a result (Harrison, 2018). Satisfaction refers to the extent that both parties are satisfied with one another as a result of positive engagement (Harrison, 2018; Tsai & Men, 2018). Commitment refers to how strongly both parties feel that the relationship is worth continuing and maintaining (Harrison, 2018). Trust refers to the feelings an individual has regarding the integrity and dependability of an organization (Harrison, 2018). Relational outcomes are significant indicators of donor loyalty toward a nonprofit organization (Pressgrove & McKeever, 2016). The cultivation and maintenance of relationships with an organization's publics is significant because relationships are key to an organization's purpose and success (Hatun, 2016; Men & Muralidharan, 2017). Thus, in the nonprofit sector, it is important for leaders to build and nurture communal relationships.

Communal relationships. A communal relationship exists when both parties provide benefits to the other motivated by concern and the general welfare of the other (Li & Li, 2014; Sisson, 2017a). Communal relationships are desirable among leaders of nonprofit organizations because these relationships are critical to achieving organizational outcomes and the promotion of social responsibility (Hon & Grunig, 1999). Furthermore, communal relationships align with the expectations of long-term relationship outcomes and often result in a higher relationship quality as well as more public support (Li & Li, 2014).

Leaders may need to establish and build communal relationships with the publics before an exchange can occur such as donations (Hon & Grunig, 1999). Leaders who establish positive relationships between organizations and their publics can benefit the organization through enhanced organizational reputation as well as increased supportive intentions and behaviors from key publics such as donors and volunteers (McDonald, Weerawardena, Madhavaram, & Mort, 2015; Men & Muralidharan, 2017). Establishing and maintaining positive relationships with publics, such as donors, are necessary to the sustainability of nonprofit organizations because many donors do not support nonprofits through repeat donations (Ramanath, 2016; Wiggill, 2014). Asking current donors to donate again is more efficient and cost-effective than seeking new donors (Harrison, Xiao, Ott, & Bortree, 2017). Nonprofit leaders can use social media as a platform to establish long-term relationships with publics without the expectation of anything in return, resulting in a communal relationship (Li & Li, 2014).

Supporting Theory: Stewardship Theory

A supporting conceptual framework for this study was Kelly’s (1998) stewardship strategies for relationship cultivation and management. Kelly proposed four components of stewardship including reciprocity, responsibility, reporting, and relationship nurturing. In terms of fundraising and donor relations, stewardship is essential to the success of a nonprofit organization in which leaders rely on repeat donations and public participation (Harrison, 2018). Effective stewardship can lead to positive organization–public relationships (Harrison, 2018).

Nonprofit leaders demonstrate the elements of stewardship through their work. Leaders of nonprofit organizations demonstrate reciprocity through public acknowledgment and gratitude of donations and volunteer commitments (Clark, Maxwell, & Anestaki, 2015). Leaders also communicate respect through public recognition of donors and volunteers (Kim & Um, 2016). Leaders of nonprofit organizations exhibit responsibility by keeping promises to the organizations' publics and through reporting the use of funding to support the mission of the organization (Pressgrove & McKeever, 2016). Reporting keeps the public informed about organizational activities as well as demonstrates accountability through transparency (Clark et al., 2015). It is important to report information regarding instances when leaders requested support from donors or volunteers (Harrison et al., 2017). Leaders of nonprofit organizations nurture relationships through initiating dialogue with publics and fostering the participation of publics into long-term relationships with the organization as demonstrated through the solicitation of donations and volunteer commitments in support of the organization's mission (Pressgrove & McKeever, 2016).

Leaders of nonprofit organizations can use social media as a communication tool to establish and nurture relationships with their publics (Clark, et al., 2015). Through increased transparency via social media, leaders of nonprofit organizations can encourage the development of trust and credibility (Gao, 2016). For instance, financial disclosures online are important in terms of transparency in the nonprofit sector and the associated impact on trust and credibility (Blouin, Lee, & Erickson, 2018). A lack of transparency and accountability lowers public trust and leads to decreased donation behavior and perceived quality (Becker, 2018).

Trust is also a critical factor in establishing and maintaining a loyal relationship between the leaders of an organization and their publics (Kapucu & Demiroz, 2015; Wiencierz, Poppel, & Rottger, 2015). Trustworthiness among publics can lead to donations; a higher level of trust correlates with a higher level of intention to donate, an increased likelihood that supporters will invite others to invest in the cause, and an increased probability of positive user-generated content (Kapucu & Demiroz, 2015; Wiencierz et al., 2015). For example, leaders of nonprofit organizations receive more donations when they voluntarily disclose positive financial performance information via social media including details regarding the effective use of donations (Blouin et al., 2018).

Stewardship, the demonstration of effective use of resources, is a significant aspect of effective relationship management (Pressgrove, 2017; Pressgrove & McKeever, 2016). Under the theory of stewardship, leaders have a high level of identification with the mission of the organization (Van Pueyvelde, Caers, Du Bois, & Jegers, 2016). The concept of stewardship is important for nonprofit organizations because their leaders have an intrinsic obligation to be good stewards of financial resources entrusted for the use of public good (Pressgrove & McKeever, 2016). Furthermore, specific stewardship strategies, such as reciprocity, can be used by leaders of nonprofit organizations to sustain relationships with major donors (Pressgrove & McKeever, 2016). Effective stewardship can lead to long-term relationships because donors will feel valued and know that the leaders acknowledge their efforts in supporting the organization (Harrison et al., 2017).

Contrasting Theory: Agency Theory

Agency theory is based on a contractual relationship between principals and agents, with each party having its own set of goals and needs to fulfill (Bernstein, Buse, & Bilimoria, 2016). In the nonprofit sector, principals (donors and board members) entrust agents (leaders) and are dependent on the agents to provide the necessary services and information. However, agents have a low identification with the mission of the organization and may act opportunistically (Van Pueyvelde et al., 2016), resulting in information asymmetry and goal conflict (Bernstein et al., 2016).

The contractual and self-interest characteristics of agency theory differ from the communal, relationship-building tenets of Kelly's (1998) stewardship strategies for relationship cultivation and management as well as Hon and Grunig's (1999) concept for measuring long-term organization–public relationships. Nonprofit leaders who use agency theory as a lens would not be able to build long-term relationships with publics because they would serve their self-interests rather than contribute to building communal and collaborative relationships (Campbell & Lambright, 2017).

Although researchers like Van Pueyvelde et al. (2016) have suggested the need for a balance of agency and stewardship theory in nonprofit leadership, others have noted that through the lens of agency theory, even if both parties act altruistically, donors and leaders of nonprofit organizations will think differently about how to meet the needs of the public good (Parker, Dressel, Chevers, & Zeppetella, 2018). The objectives of the leaders must align with the organizational mission to not impact performance (Van Pueyvelde et al., 2016). Additionally, donors and nonprofit leaders are more likely to develop relationships that are more stewardship-like (Campbell & Lambright, 2017). Nonprofit leaders are developing higher quality relationships with donors due to the dialogic communication that occurs because of a mutually communal arrangement (McCaskill & Harrington, 2017).

Social Media

Since its inception in the early 2000s (Lomborg, 2017), social media has become a primary channel for leaders of nonprofit organizations and for-profit organizations to reach their publics. The communal, interactive, and personal characteristics of communicating via social media allow leaders to engage publics in more meaningful relationships, conversation, and behaviors of support (Men & Tsai, 2015; Soboleva, Burton, Daellenbach, & Basil, 2017). Moreover, leaders can interact and build relationships with publics in the digital environment that might not exist otherwise offline (David & Moscato, 2018; Smith, 2018).

Social media is gaining popularity with nearly 69% of American adults actively engaging in at least one social media platform (Dong & Rim, 2019). Highly engaged individuals are creating content on social media platforms (Li, 2016). Social media users can select their interactions based on their individual interests, priorities, geographic locations, and matters that are personally relevant (Clese, 2015). Individuals' motivations for using social media include interacting with others with similar interests, promoting organizations, sharing of information, convenience of communication, entertainment, and indicating wants and needs to others (Srivastava, Saks, Weed, & Atkins, 2018). Additionally, using social media platforms, users give visibility to their social networks (Garczynski, 2016).

Through social media, all users can engage in dialogue with one another in a manner that defies the traditional top-down approach of traditional media (Kim & Park, 2017; Seelig, Millette, Zhou, & Huang, 2019). Leaders of nonprofit organizations can engage users in new ways and capitalize on the natural connections that develop through their public's individual networks. User engagement naturally leads to cultivating and maintaining relationships with the leaders of organizations (Men & Tsai, 2015). However, as changes occur in the digital platforms, more research is needed to ensure leaders are equipped with the knowledge to create strategies that will guide them in achieving organizational objectives. Social media as a communication tool and object of research is consistently in a state of fluctuation (Lomborg, 2017). Developers make changes to the interfaces of the existing platforms, which can alter the way users and leaders of organizations utilize the services (Hestres, 2017). Additionally, developers are consistently launching new platforms and users migrate from one platform to another (Lomborg, 2017).

Social Media Use

Social media has widely replaced the use of more traditional forms of communication and the opportunities for disseminating and receiving organizational information have improved (Tripathi & Verma, 2018). The extent to which leaders of government agencies, for-profit, and nonprofit organizations have adopted social media varies. However, leaders have recognized the opportunities for collaboration and engaging with key publics via social media. For leaders of nonprofit organizations, the use of social media affords new opportunities for transparency, information dissemination, and donor and volunteer recruitment (Ihm, 2015). It is important for nonprofit leaders to consider capacity and organizational objectives when determining what level of social media use is appropriate for the organization (Lai, She, & Tao, 2017). Despite the abundance of opportunities for use, in the nonprofit sector, leaders do not use social media to their full potential (Sisson, 2017a).

Establishing and maintaining relationships. A relationship begins between an organization and its publics when consequences created by the individuals of an organization or the publics affect one another (Hon & Grunig, 1999). Leaders of organizations have learned that adopting principles of establishing communal relationships with its publics is necessary for meeting organizational objectives (Kodish, 2015). Cultivating new relationships is critical for nonprofit leaders due to the increase in competition for organizational resources and donations. Moreover, leaders must focus on developing long-term relationships with donors due to the lack of repeat donations among first-time donors (Khodakarami, Petersen, & Venkatesan, 2015; Wiggill, 2014).

Researchers have used the tenets of the organization–public framework in studying social media because of the public nature and relationship building properties of the platforms (Brubaker & Wilson, 2018). The quality of an organization–public relationship positively aligns with the virtual connectivity of the organization (Sommerfeldt & Kent, 2015). Through linkages with the online environment, leaders of organizations can acquire resources when using strategic communication as a relationship building function (Sommerfeldt & Kent, 2015). Using social media as a channel for strategic communication, leaders of organizations can establish and maintain relationships with their publics (Gao, 2016; Hatun, 2016; Kodish, 2015; Men & Tsai, 2015; Tao & Wilson, 2015).

As a relationship cultivation tool, researchers discovered that leaders could use social media for information dissemination, disclosure, as well as interactivity and engagement (Feng, Du, & Ling, 2017; Metzgar & Lu, 2015). Information dissemination includes sharing of organizational information while addressing the needs of the public. Disclosure refers to the level of transparency with which leaders communicate with their publics. Interactivity and engagement represent the level of intent with which the leaders of the organization engage with publics (Metzgar & Lu, 2015). The activities of liking, posting, retweeting, and sharing an organizations posts are representative of the publics level of engagement and may indicate the existence and cultivation of relationships (Dong & Rim, 2019).

In addition to establishing relationships, leaders of nonprofit organizations can maintain relationships and build the reputation of the organization through social media

(Kodish, 2015; Tao & Wilson, 2015). Through social media, leaders of nonprofit organizations can intensify the process of relationship management by reaching large audiences and initiating interactions with key publics (Wiencierz et al., 2015). Keeping the members of publics informed consistently is essential to maintaining organization–public relationships for nonprofit leaders (Sisson, 2017a). Due to the relationship-oriented nature of social media, leaders of nonprofit organizations can engage with publics on a personal and social level in a more meaningful manner (Men & Tsai, 2015). Leaders can enhance relationships via social media through initiating conversations that are more open and humanistic in voice (Sundstrom & Levenshus, 2017). Maintaining relationships in nonprofit organizations is important because meaningful relationships can lead to increased donations from key publics (Wiencierz et al., 2015).

Relationship management is essential to the success of the organization in the nonprofit sector. Leaders of nonprofit organizations successfully obtain financial resources by building and maintaining relationships following a cycle of identification, establishment, cultivation and maintenance, solicitation, and stewardship of donor publics (Erwin & Dias, 2016). Hon and Grunig (1999) suggested the use of stewardship strategies in maintaining relationships with an organization's publics. Using stewardship strategies, leaders of nonprofits can communicate more effectively with donors and ensure their continuous connection with the organization while fostering repeat donations (Harrison et al., 2017).

One-way communication. The dissemination of information is a one-way communication strategy because the action does not elicit a response from the public.

Leaders of nonprofit organizations disclosing financial information in an act to increase transparency, yet not seeking feedback or input from the publics is an example of a one-way communication strategy (Li, 2015). In the nonprofit sector, leaders primarily use social media as a communication tool to disseminate information (Cho, Schweickart, & Haase, 2014).

Huang, Lin, and Saxton (2016) conducted a content analysis of 110 HIV/AIDS nonprofit organizations by examining the relationship between Facebook messaging strategies and audience reactions. The researchers aimed to determine how the leaders of HIV/AIDS nonprofit organizations use social media as a communication tool. Huang et al. examined three message-level variables: information-based messages, mission relevance, and the use of hashtags. The researchers determined that leaders of HIV/AIDS nonprofit organizations use information-based messages as a one-way communication strategy over two-way communication strategies via social media. Further, the use of information-based and action-based messages related to the mission did not result in higher engagement from the audiences (Huang, Lin, & Saxton, 2016). The researchers assigned the lack of engagement by the audiences to the lack of knowledge in using social media as a communication tool on behalf of the facilitators.

Burger (2015) conducted research examining how German nonprofit organizations use social media, specifically Facebook, to interact with the public. The researcher analyzed 824 messages from 215 nonprofit organizations and found that more than half of the messages were information-based, 26% of the messages were community oriented, and the remaining 20% of messages were action-based. Additionally, most messaging strategies employed by leaders of nonprofit organizations were one-way in nature and that Facebook followers rarely commented on posts (Burger, 2015). In their 2016 study, Gálvez-Rodríguez, Caba-Pérez, and López-Godoy achieved similar results regarding one-way communication strategies in which leaders of nonprofits employed the Twitter platform.

One-way communication activities are essential to relationship cultivation efforts (Brubaker & Wilson, 2018). However, minimizing social media use to one-way communication strategies hinders the ability of leaders of nonprofits to develop relationships and engage with publics (Park et al., 2016). Leaders of nonprofit organizations should not limit their communication strategies to one-way information dissemination, rather they should include opportunities to interact and create dialogue with their publics (Gálvez-Rodríguez et al., 2016; Gao, 2016). Further, nonprofit leaders should develop a communication strategy including both one-way and two-way communication strategies in which publics and leaders of nonprofits can engage with one another (Brubaker & Wilson, 2018). However, leaders of nonprofit organizations may need to dedicate financial and personnel resources to move beyond one-way communication strategies (Sundstrom & Levenshus, 2017).

Two-way communication and engagement. Engagement is foundational in building organization–public relationships (Tsai & Men, 2018). Using social media, leaders of nonprofit organizations can connect with individuals, participate in online discussions, as well as create and share content with their publics. Publics who engage regularly via social media have more trust and feel a higher level of commitment and satisfaction with the leaders of the organization (Men & Muralidharan, 2017).

Leaders of nonprofit organizations have a higher capacity to interact with their publics and engage in two-way symmetrical communication through the messaging capabilities of social media (Saxton and Wang, 2014). Two-way communication is characterized by the sending and receiving of information and feedback from both parties to one another (Li & Li, 2014). Dialogue is the result of the two-way interaction between leaders and their publics (Watkins, 2017). Dialogue is critical to ensuring effective communication and improving the quality of organization–public relationships (Sisson, 2017a).

Using Hon and Grunig's (1999) concept for measuring long-term organization–public relationships, Li and Li (2014) conducted research to study the effects of message strategy and interactivity on Twitter from a relationship building perspective within the context of social media. Specifically, the researchers examined the effectiveness of two messaging strategies: communal-relationship and exchange-relationship oriented messages. The researchers concluded that highly interactive messages resulted in higher levels of perceived credibility towards the organization and that communication strategies with different relationship orientations differ in quality. Specifically, communal-relationship oriented messages are more effective in producing positive organization–public relationship outcomes such as control mutuality and trust (Li & Li, 2014). Although merit exists to both relationship types, communal relationships are preferred in the nonprofit sector.

Through the environment of the Internet, leaders should foster dialogue contributing to the establishment and maintenance of reciprocal relationships (Gao, 2016). The researcher conducted quantitative content analysis to determine how the leaders of nonprofits in China who rely on public fundraising use social media. Specifically, Gao (2016) sought to understand what dialogic and message strategies leaders use to target and engage stakeholders. Gao concluded that the use of two-way communication strategies had a positive relationship with user engagement. Posts in which leaders extended event invitations, stimulated conversations, or asked for donations, were more likely to elicit engagement from users in the form of comments, likes, or shares of the post (Gao, 2016). Although leaders of nonprofit organizations in China are adopting social media as a communication tool, the use of information-based messages are more prevalent than two-way communication strategies (Gao, 2016).

Kim and Yang (2017) conducted research examining when user engagement in the form of a like, share, or comment can be encouraged by differing organizational messages on Facebook. The researchers performed a content analysis of 20 organizations' Facebook posts. Kim and Yang concluded that posts with sensory and visual features led to likes, messages containing logical information are more likely to elicit comments, and messages comprising sensory or visual elements as well as logical information led to shares. The results of the study are significant when considering the level of engagement associated with each activity.

In the simplest form, liking content requires very little engagement from the user (Kim & Yang, 2017). Users commenting on content involves more effort and involvement because they are contributing content. In the highest form of engagement, users who share content are engaged with the organization and making an active choice to distribute information on behalf of the organization indicating their alignment with the content (Kim & Yang, 2017). Based on the results of their study and the levels of user engagement, Kim and Yang (2017) recommended two-way communication strategies to elicit comments and shares, the highest forms of engagement, from users.

Kite, Foley, Grunseit, and Freeman (2016) also conducted research to identify the features of Facebook posts that are associated with higher user engagement. The researchers reviewed content on 20 Facebook pages of public health organizations in Australia. Kite et al. used likes, shares, and comments, as their indicators of user engagement determining that video posts attracted the most considerable amount of user engagement. Posts featuring fact-based information also drew high levels of user engagement (Kite et al., 2016).

Asking for feedback regularly, incorporating dialogue showing the value of publics' opinions and feedback, providing decision-making opportunities, and implementing suggestions made by an organizations' publics are strategies that leaders can use to enhance the organization–public relationship (Sisson, 2017a). Subsequently, when leaders use two-way communication strategies to reach their organizations' publics, they instill the feelings of value in their donors contributing to the generation of new donations and donor retention (Sisson, 2017a). Social media is a two-way communication vehicle that leaders can use to more adequately meet the needs of the organization and publics alike (Lister et al., 2015). The use of dialogic communication strategies is necessary to increasing awareness and public engagement and leaders of nonprofit organizations should extend their social media use beyond solely having a presence (Gao, 2016). While engaging in dialogic communication is beneficial over merely maintaining a social media presence (Li, 2015), the two-way dialogic capabilities of social media remain underutilized by leaders of nonprofit organizations (Watkins, 2017).

Advocacy and cause-related campaigns. Advocacy and cause-related campaigns are additional examples of the use of social media in the nonprofit sector. Leaders of nonprofit organizations regularly use Facebook and Twitter for advocacy (Hestres, 2017). Nonprofit leaders will use social media as a vehicle for promoting their organization and cause (Young, 2017), furthering societal missions, and increasing organizational awareness (Raman, 2016).

Nonprofit leaders are experiencing an increase in the level of difficulty to obtain funding and other resources in the short term using traditional advocacy strategies (Lister et al., 2015). The use of social media offers leaders the opportunity to appeal to the masses and garner ongoing support from the community. Instagram and Pinterest are social media platforms that leaders can use for sharing and promoting campaign information resulting in a more substantial, more meaningful impact (Lister et al., 2015).

Leaders of nonprofit advocacy organizations can also use social media to speak out on a cause and gain public attention to create social change (Guo & Saxton 2018). The researchers acknowledged that gaining public attention requires the receipt of effective messages by supporters before any real tangible benefits will occur. Guo and Saxton conducted research investigating the Twitter accounts of 145 nonprofit advocacy organizations to determine how leaders of nonprofit advocacy organizations gain attention via social media. Network size, the frequency of tweeting, visual content as a messaging strategy, and retweeting as a function of a connection strategy impacted the amount of attention garnered via social media (Guo & Saxton, 2018). Moreover, leaders of nonprofit advocacy organizations gain more attention through social media by speaking more frequently, engaging in conversations, and growing an extensive follower base. The need exists for further research to determine whether the attention gained via social media contributes to intangible or tangible organizational outcomes (Guo & Saxton, 2018).

The historical Ice Bucket Challenge organized by leaders of the Amyotrophic Lateral Sclerosis Association is an example of a successful cause-related campaign (Kim & Um, 2016). The cause-related campaign resulted in over $100 million in donations for the Amyotrophic Lateral Sclerosis Association. In a study of cause-related campaigns, the desire for participant recognition surfaced as an explanation for success (Kim & Um, 2016). The researchers conducted a study to determine the effect of social recognition for donating to cause-related campaigns on social media, concluding that social recognition is a primary determinant in increasing individuals’ intentions to donate or volunteer. Additionally, self-efficacy is a motivating factor in an individual’s intention to give as well as a high level of involvement with a cause (Kim & Um, 2016).

In cause-related fundraising, the determinants for donations are different for those who give online via social media versus those of traditional donors (Saxton & Wang, 2014). The researchers proposed that technological capabilities, industry, and network-based effects are the key drivers of charitable donations in the social media environment.

In a study of fundraising efforts on Facebook Causes for 66 large-sized nonprofit organizations in the United States, the type of cause and the size of the organization affected online charitable contributions the most (Saxton & Wang, 2014). Causes such as those related to health or those that benefit the general public are more prone to receive contributions. Furthermore, donors may prefer to contribute to smaller nonprofit organizations although contribution amounts may be reduced when made via social media (Saxton & Wang, 2014).

Challenges to Social Media Use

Leaders of nonprofit organizations are not natural adopters of technology, posing many challenges for using social media (Gao, 2016). Among the many challenges, a perceived lack of leader ease to adopt social media is a challenge to the application of such technologies in nonprofit organizations (Lister et al., 2015). The lack of capacity among staff and knowledge of managing social media are also barriers to adoption (Campbell, Lambright, & Wells, 2014; Gilstrap & Minchow-Proffitt, 2017; Huang et al., 2016; Sun & Asencio, 2019). Leaders of nonprofit organizations are unable to use social media to their full potential if they do not have the ability to properly engage followers (Smith, 2018).

The proper management of social media takes a considerable amount of time and leaders of nonprofit organizations already face the management of limited resources and funding. In smaller nonprofit organizations, employees fulfill multiple roles (Biga, Spott, & Spott, 2015). Keeping up with the constant interface changes pose an issue for leaders of smaller nonprofit organizations who do not have the time and resources to keep up to date with the new developments (Hestres, 2017).

Balancing the management of social media, long-term social media strategy, and openness relative to the information disclosure are all challenges for nonprofit leaders in using the platforms (Jin, Lin, Gilbreath & Lee, 2017). Many nonprofit leaders have not established goals relative to social media or included social media in their long-term strategic plan due to a lack of understanding regarding the benefits of the platforms (Young, 2017). Some leaders of nonprofit organizations have not embraced social media due to a lack of long-term vision for employing social media to obtain organizational objectives (Campbell et al., 2014). Apprehension over the social media return on investment and other social media contributions remains a concern for leaders already bound by a lack of resources (Agostino & Sidorova, 2016; Xu & Saxton, 2019). Additionally, funding is a challenge for the adoption of social media strategies by nonprofit leaders (Sun & Asencio, 2019).

Some leaders are concerned with ensuring that posted content is relevant to their audience (Goldkind, 2015). Also, some nonprofit leaders may find it challenging to identify salient publics with whom to connect via social media (Lai et al., 2017) while others are hesitant to use social media due to the concern that some topics would be inappropriate for their target population (Campbell et al., 2014). Additionally, leaders of nonprofit organizations may struggle with conveying their activities through online platforms to publics in a way that adds meaning (Sisson, 2017a).

Leaders of nonprofit organizations do not respond at a comparable rate to the increasing usage levels of the publics (Kodish, 2015). Leaders view the opportunities for expression and communication via social media as complex and unpredictable. Therefore, leaders may discourage the use of the platforms out of fear of the level of difficulty in managing social media accounts (Kodish, 2015). Further, security, privacy, and threat to productivity are challenges to the adoption of social media use (Kodish, 2015). Maintaining organizational identity in the online environment is a challenge for some nonprofit leaders (Young, 2017). The implementation of social media policies and strategies may reduce the challenges associated with identity, privacy, and security as well as maintain organizational ethics and formalize online activities (Gilstrap & Minchow-Proffitt, 2017; Sun & Asencio, 2019).

Positive and Negative Implications

Leaders of nonprofit organizations who strategically implement a social media strategy can benefit from various positive implications. However, the use of social media can also adversely impact an organization when leaders do not create and implement a social media strategy. By nature, publics are quick to declare their displeasure with organizations (Sisson, 2017a). Haigh and Wigley (2015) studied how negative, user-generated content on Facebook influenced stakeholders' perceptions of the organization. The researchers found that stakeholders' perceptions of the organization–public relationship were significantly less positive after exposing individuals to negative Facebook posts. Publics are more likely to trust others like themselves over organizational leaders and to perceive organizational sources as lacking credibility (Kim & Park, 2017).

Some leaders of nonprofit organizations have acknowledged the possible threat of negative user-generated content, expressing fear over the potential loss of control of message via social media (Svensson et al., 2014; Watkins, 2017). If the public loses trust in the organization, donations, support for organizational activities, and positive word-of-mouth advertising may suffer (Wiencierz et al., 2015). Misinformation can erode the trust between the leaders of an organization and the publics (Sisson, 2017b). Trust is one of the measurements of a successful organization–public relationships (Hon & Grunig, 1999) and is at the core of creating positive social capital (Davis & Moscato, 2018). Damaged organization–public relationships can have a significant impact to the leaders of nonprofit organizations relying on donations to meet organizational objectives.

Rather than avoiding social media as a communication tool, leaders of nonprofit organizations should proactively consider strategies to address negative, user-generated content on Facebook and other social media sites. Specifically, leaders of nonprofit organizations can address negative user-generated comments by engaging in dialogic communication and attempting to thwart negative perceptions (Wiencierz et al., 2015). Nonprofit leaders may experience greater tangible benefits such as increased fundraising and volunteer commitments when accepting the open capabilities of social media and dedicating specific resources to the management of the platforms (Svensson et al., 2014).

In addition to the implications of negative, user-generated content, further implications exist for leaders of nonprofit organizations relying solely on social media as a communication and fundraising strategy or those who do not maintain their social media accounts. Simply implementing a social media account will not suffice (Gálvez-Rodríguez et al., 2016); leaders must recognize that the use of social media cannot substitute traditional communication and fundraising channels. Nonprofit leaders should develop a robust communication and engagement strategy including traditional channels and social media to maximize market exposure and mitigate communication channels (Ihm, 2015; Saxton & Wang, 2014; Shan et al., 2015). Leaders should stay active on their social media accounts because a lack of activity can be a negative signal to publics resulting in a loss of support (Smith, 2018).

The social media environment is quickly becoming information saturated as more organizations and individuals create content (Brubaker & Wilson, 2018; Guo & Saxton, 2018). Some ideas and trends capture the immediate attention of audiences on social media while concealing others (Powell, Horvath, & Brandtner, 2016). An information-saturated environment could add a level of difficulty for leaders of nonprofit organizations to grab the attention and resources from potential donors and volunteers. Furthermore, the amount of information available via social media might make it more difficult for users to locate credible and trustworthy knowledge (Kim & Park, 2017; Lin, Spence, Sellnow, & Lachlan, 2016). Leaders of nonprofit organizations can mitigate this negative implication by incorporating social media best practices including the use of less formal language, visual appeal, as well as customized and open-ended content that encourages two-way asymmetrical communication (Shan et al., 2015).

Despite the potential for negative implications, leaders of nonprofit organizations may benefit largely from the many positive implications of social media use. Nonprofit leaders should use communication tools that facilitate listening, feedback, and dialogue (Shan et al., 2015). Via social media, leaders of nonprofit organizations can provide direct and immediate feedback to their publics (Banyai, 2016; Sisson, 2017a) enhancing the organization–public relationship (Haigh & Wigley, 2015; Jain & Winner, 2016; Sisson, 2017a). Through social media, leaders of nonprofit organizations can seize opportunities as they come available when changes in mainstream issues arise (Smith, 2018).

Additionally, the use of social media offers leaders of nonprofit organizations more potential for two-way communication because receivers are also senders and can contribute within the online forum (Dijkmans, Kerkhof, Buyukcan-Tetik, & Beukeboom, 2015). Engaging in two-way communication via social media allows leaders of organizations to meet the publics' growing need for engagement, to be heard, and for those leaders to respond appropriately (Banyai, 2016). Furthermore, the use of social media allows the public to provide input that may improve the communications, decision making, and services rendered by the leaders of an organization (Gálvez-Rodríguez et al., 2016; Shan et al., 2015). Also, leaders of nonprofits can proactively invite donors and volunteers to follow their social media sites, encouraging two-way communication and providing opportunities to respond to the public's needs (Clese, 2015). Deeper engagement with publics allows leaders of nonprofit organizations to facilitate collective action in communities as well as greater social impact (Ihm, 2015).

Prior to the advent of social media, leaders would encounter geographic limitations in the context of relationship building with publics. Now, nonprofit leaders can benefit from the added ease of reaching geographically dispersed audiences through social media (Lim, Hwang, Kim, & Biocca, 2015). Additionally, leaders of nonprofit organizations can communicate to large audiences quickly and efficiently (Carboni & Maxwell, 2015; Linas, 2019; Wiencierz et al., 2015). Capturing a larger audience can allow leaders of nonprofit organizations a better opportunity to capture donations and mobilize human resources to achieve greater good (Smith, 2018). However, larger audiences do not necessarily equate to a higher engagement with publics (Ponte, Carvajal-Trujillo, & Escobar-Rodriguez, 2015).

Another benefit of using social media is the ability for leaders to reach diverse populations. The use of social media increases accessibility to organizations by removing barriers that would otherwise exist for some populations such as the physically disabled or those with socioeconomic limitations including lower incomes or working hours (Mano, 2014). Additionally, leaders of nonprofit organizations can easily reach new (Linas, 2019) and younger audiences via social media. Capturing younger generations as key publics and their engagement with organizations via social media is important for nonprofit organizations (Smith & Gallicano, 2015). Individuals from younger generations perceive their online engagement with organizations as a personally initiated and natural activity driven by four factors: information consumption, sense of presence, interest immersion, and social connectivity (Smith & Gallicano, 2015). Engagement can precede the organizational-public relationship and individuals of younger generations are seeking dialogic communication on social media from leaders of organizations in the form of feedback, especially with those organizations with whom they are most interested in establishing a relationship (Smith & Gallicano, 2015).

Biga et al. (2015) identified the millennial generation as one whose members focus on the needs of the community rather than those of individuals. Establishing relationships with individuals of this generation is critical to meeting organizational objectives because this generation may surpass others in size (Biga et al., 2015). It is important for nonprofit leaders to establish relationships with this generation because new donors tend to be younger and give more substantial donations than traditional donors (Saxton and Wang, 2014). The amount that younger donors contribute could be a limitation of the demographic; however, younger donors might give more over their lifetime when retained (Tysiac, 2016). Also, nonprofit leaders are more likely to reach younger donors via social media and using transparent communications is significant in motivating the more youthful generations to donate. The March of Dimes is an organization whose leaders experienced success engaging large audiences while attracting a new and younger follower base via social media (Wang, 2014).

In addition to reaching large, geographically dispersed, new, and younger audiences, the barriers to entry are low for social media (Lomborg, 2017). The use of social media offers alternatives to high-priced, traditional marketing avenues in which leaders of nonprofit organizations lack the funds in their budgets (Crumpton, 2014; Lister et al., 2015). Leaders of nonprofit organizations can benefit from the word-of-mouth communication, the ease of shared communication across social networks, and the associated credibility (Ashley & Tuten, 2015; Kodish, 2015). Online sharing typically occurs naturally and at no cost to the organization (Soboleva et al., 2017).

Nonprofit leaders can benefit from the natural social networks that exist by engaging wider audiences through viral content (Besana & Esposito, 2016). In a study using the network data of three health service organizations, stakeholder networks were tightly woven, revealing opportunities for engagement and relationship management with publics (Wyllie et al., 2016). Further, social media and networking are effective means of increasing consumption both online and offline as well as enhancing voluntary involvement and monetary donations for nonprofit organizations (Mano, 2014). Nonprofit leaders can increase engagement with individuals and potentially obtain donations through social networks that otherwise may not have been accessible (Davis & Moscato, 2018; Herzog & Yang, 2018).

Online donating is a rational behavior involving self-interest and altruism (Zhong & Lin, 2018). Individuals need for altruism or the opportunity to establish a positive self-image in front of their peers are the motivating factors supporting donation behavior. Further, when driven by altruism, individuals are more likely to donate more substantial amounts and exert more influence over their peers to contribute as well (Zhong & Lin, 2018). Donors and nonprofit leaders benefit from the ease of online donating and the safe transfer of funds (Zhong & Lin, 2018). However, online fees may be an inhibitor to the receipt of donations (Lacetera, Macis, & Mele, 2016).

There are many positive implications for leaders of nonprofit organization who choose to incorporate social media into their communication and engagement strategy. Nonprofit leaders can manage social networks with ease and benefit from the existence of an electronic record of communications and actions with publics as well as from social capital and improved trust (Skoric, Zhu, Goh, & Pang, 2016). Additionally, leaders can develop strategies to improve donor management using the reporting benefits of social media (Raman, 2016).

The use of social media to build effective organization–public relationships online yields additional benefits to leaders of nonprofit organizations. Significant to achieving organizational objectives, leaders of nonprofits benefit from promoting knowledge about the organization, fostering positive attitudes about the organization, and developing repetitive behaviors among publics such as volunteerism and donations (Sisson, 2017a). Leaders who develop social media strategies that focus on building strong relationships with publics who are well informed about the organization's efforts will benefit through increased donations. Leaders may also benefit from online endorsements from publics who are more likely to engage with online nonprofit organizational content (Benritter, Verlegh & Smit, 2016). The use of social media can create benefits for both the organization and the publics (Besana & Esposito, 2016; Brubaker & Wilson, 2018) resulting in coveted communal relationships. Yet, the use of social media properties relating to engaging publics and building relationships with donors in the nonprofit sector remains underutilized.

Transition

In Section 1, I provided the foundation of this study. First, I shared the background of the problem followed by the problem and purpose statements. Next, I discussed the nature of the study, the central research question, the conceptual framework, the operational definitions, the assumptions, limitations, and delimitations as well as the significance of the study. Finally, I reviewed the academic and professional literature relevant to the research topic and conceptual framework. I used Hon and

Grunig's (1999) concept for measuring long-term organization–public relationships as a lens through which to analyze the literature regarding strategies for building long-term relationships via social media in nonprofit organizations.

In Section 2, I provide a comprehensive description of the project including the purpose of the study, my role as the researcher, and the study participants. Additionally, I include an in-depth description of the research method and design as well as the ethical research responsibilities. I also discuss the population and sampling of the study, data collection methods and techniques, and conclude the section with details of the data analysis process as well as the reliability and validity considerations of the study.

In Section 3, I use the 2017-2018 Baldrige Excellence Framework and embedded interview questions to answer the central research question as well as evaluate performance outcomes for the client organization. I begin Section 3 with the Organizational Profile of the client organization and include a detailed analysis of the following key management and leadership areas of the 2017-2018 Baldrige Excellence Framework: (a) leadership, (b) strategy, (c) customers, (d) measurement, analysis, and knowledge management, (e) workforce, (f) operations, and (g) results. Additionally, in Section 3, I describe the study findings including key themes, a project summary, and contributions and recommendations for future research.

Section 2: The Project

In Section 2, I provide an overview of the design of the study as well as present the details of the study plan. In this section, I share detailed information about the purpose of the study, my role as the researcher, the study participants, and the research method and design. I also discuss the population and sampling of the study, research ethics, data collection methods and techniques, data analysis as well as the reliability and validity of the study.

Purpose Statement

The purpose of this qualitative single case study was to explore the strategies nonprofit leaders used for building long-term donor relationships through social media. The targeted population for this study consisted of senior leaders from a nonprofit organization in Southern California who have successfully implemented social media strategies to build long-term donor relationships. The implications for positive social change are that the findings of this study may enable nonprofit leaders to secure donor resources for organizational sustainability to continue supporting communities and the public.

Role of the Researcher

The researcher serves as the primary data collection instrument in qualitative research studies (Fusch & Ness, 2015). Thus, in this single case study, I served as the instrument for data collection. My association with the topic of social media use in nonprofit organizations originated from my employment in a nonprofit organization that is developing and implementing a social media strategy for promotion, stakeholder engagement, and relationship building. As a senior leader in a nonprofit organization, I have over 10 years of experience in nonprofit management, strategic planning, interviewing and recruitment of staff and clients, and retention efforts. I have no prior professional or personal relationships with any of the participants in this study.

As the primary instrument for data collection, I used the principles of the Belmont Report to maintain ethical standards involving human participants through this study and obtained a signed consent form from each participant. The Belmont Report is an authoritative ethics document regarding the recognition and protection of vulnerable research participants (Zagorac, 2016). There are four guiding principles of ethical research included in the Belmont Report: generalizing beneficence, embodying ethical action, respecting participants, and negotiating justice (Bromley, Mikesell, Jones, & Khodyakov, 2015). Additionally, prior to any data collection, researchers should obtain a signed consent form from each participant ensuring his or her understanding regarding the purpose of the study, the voluntary nature of participation, and the extent of commitment to the study (Marshall & Rossman, 2016).

In this qualitative study, I served as both the data collector and the data analyst. The potential for researcher bias is a concern in qualitative studies because researchers may impose their own beliefs throughout the research process leading to the voice of the researcher overriding the voice of the participant (Birt, Scott, Cavers, Campbell, & Walter, 2016; Hadi & Closs, 2016). I mitigated bias and avoided viewing data through a personal perspective by employing member checking. Member checking is a technique for reducing researcher bias by having participants review the interview transcripts and confirm the results (Birt et al., 2016). In addition to member checking, I practiced reflexivity by maintaining a personal journal throughout the process, which promotes credibility and further reduces researcher bias (Baillie, 2015; Hadi & Closs, 2016; Marshall & Rossman, 2016).

Interviews are a predominant method of data collection in qualitative research (Oates, 2015). Researchers use semistructured interviews to understand participants' experiences through their own words and perceptions (Mitchell, 2015). Conducting interviews provides the researcher with the opportunity to yield large quantities of data quickly with the possibility of immediate follow-up and clarification (Marshall & Rossman, 2016). Phone interviews allow for more focus within the interview process and fewer pronounced interviewer effects such as the extent to which the behavior and personality of the interviewer influence the responses and behaviors of the participants (Oates, 2015). Further, researchers use interview guides and protocols to focus the content discussed in the interview (Abro, Khurshid, & Aamir, 2015; Mitchell, 2015). Therefore, I conducted recorded semistructured interviews via phone with three senior leaders using an interview protocol in alignment with the central research question (see Appendix A).

Participants

It is important to use selection criteria when working with human participants, selecting participants based on the individuals' predicted relevance and richness of information regarding the overarching research question of the study (Gentles, Charles, Ploeg, & McKibbon, 2015). Administrators and faculty of Walden University assessed and selected client organizations to participate in the DBA consulting capstone. The participants for this study included a purposive sample of three senior leaders of a small nonprofit organization in Southern California specializing in the delivery of youth enrichment services. The purpose of this qualitative single case study was to explore the strategies some nonprofit leaders used for building long-term donor relationships through social media. Thus, the client leader assisted me in selecting participants who serve the organization in a senior-leader capacity and use strategies for building long-term donor relationships through social media.

All participants who agreed to participate in this study received an informed consent form via e-mail. Researchers use consent forms to ensure that participants understand the purpose of the study, the voluntary nature of participation, and the extent of commitment to the study (Marshall & Rossman, 2016). Using a consent form via e-mail allows researchers to establish rapport with each participant through enhanced transparency and honesty (Mitchell, 2015; Oates, 2015). In addition to gaining access to participants and establishing rapport, it is necessary for researchers to develop and build relationships with participants (Mitchell, 2015), as it is essential to obtaining quality data from semistructured interviews (Oates, 2015). To develop a working relationship of trust with each participant, I conducted a series of semistructured interviews via telephone using open-ended questions and maintained frequent contact. I scheduled the semistructured interviews via telephone at the convenience of the participants, which may maximize participants' level of comfort (Mitchell, 2015). Additionally, I employed member checking as a primary strategy for relationship building with the participants through two-way communication. Using member checking allows for more frequent contact through follow-up with participants when more clarification is needed (Dasgupta, 2015) as well as enhances credibility with the participants by involving them in reviewing the interview transcripts and confirming the results (Birt et al., 2016; Hadi & Closs, 2016).

Research Method and Design

Research Method

Research questions and the methods chosen to explore them are congruent and must align with one another (Marshall & Rossman, 2016). Researchers must consider the goals and purpose of the study when selecting a research method (Claydon, 2015; Goertzen, 2017; Halcomb & Hickman, 2015). Researchers use the qualitative method to gain a more profound understanding of their studies (Abro et al., 2015). Through a qualitative research method, researchers can provide quality, depth, and richness in their findings by generating thick descriptions of the lived experiences of the participants (Guercini, 2014; Marshall & Rossman, 2016). A qualitative method was suitable for this study because the goal was to explore the lived experiences of the participants and generate a thick description of strategies used to build long-term donor relationships through social media.

In a quantitative research design, researchers collect and analyze structured data for numerical representation, measuring and quantifying the relationships among variables (Goertzen, 2017). Through quantitative research, researchers seek to explain and test a theory by collecting numerical data such as counts (Claydon, 2015).

Conversely, through qualitative research, researchers collect narrative data to generate themes that can lead to theory development (Claydon, 2015; Halcomb & Hickman, 2015).

In a mixed method research design, researchers combine qualitative and quantitative properties into a single study (Abro et al., 2015; Halcomb & Hickman, 2015; Imran & Yusoff, 2015; McManamny et al., 2015). Researchers use the mixed method to seek the convergence of results from the combination of quantitative and qualitative methods while partially overcoming the deficiencies and biases of each method (Abro et al., 2015). The focus of this single case study was not to test a hypothesis or theory but to explore strategies from the perspective of nonprofit leaders used for building long-term donor relationships through social media. Therefore, qualitative research method was best suited for this study.

Research Design

When the intent is to explore or clarify understanding of an issue or phenomenon, researchers may use a case study design (Saunders et al., 2015). Case study research is useful when the phenomenon is broad and multifaceted, and the researcher cannot study the context separately from which it occurs (Dasgupta, 2015). Researchers can use the case study design to investigate the phenomenon from multiple perspectives to develop a thick and rich description of the phenomenon under study (Taylor & Thomas-Gregory, 2015). A case study design was appropriate for this research study because I explored the strategies that nonprofit leaders used for building long-term relationships with donors through social media.

As an alternative to case study design, qualitative researchers can employ a phenomenological design or an ethnographic design. Ethnography is a form of social research in which researchers study individuals in their cultural context (Draper, 2015; Wall, 2015). Using an ethnographic design, the researcher will immerse him or herself into the environment to observe how the participants view life and the phenomena under investigation (Brown, 2014). Researchers use an ethnographic design when they seek to gain a deeper understanding of the real world by studying people's lives in the everyday context in which they live (Draper, 2015). An ethnographic study was not suitable for this study because the intent of this research was not to reveal the common elements of culture related to nonprofit leaders.

Phenomenology is a philosophy and research method that researchers use to describe people's experiences (Alase, 2017; Matua, 2015). Researchers use a phenomenological research design when they wish to conceptualize an individual's viewpoint of the phenomenon under study, including the meaning given to the experiences (Matua, 2015; Matua & Van Der Wal, 2015). A phenomenological design was not suitable for this study because summarizing the meaning of experiences of nonprofit leaders was not the purpose of this study. Furthermore, achieving data saturation is not common within studies in which researchers use a phenomenological design (Gentles et al., 2015).

Researchers achieve data saturation when no new themes or ideas emerge in the data (Boddy, 2016; Hancock, Amankwaa, Revell, & Mueller, 2016; Kline, 2017). Additionally, data saturation occurs when enough information exists to replicate the study and when further coding is no longer possible (Fusch & Ness, 2015). Interviews are one method by which researchers can achieve data saturation (Fusch & Ness, 2015). I interviewed nonprofit senior leaders using semistructured interview questions until reaching data saturation. Additionally, I used a saturation grid as recommended by Fusch and Ness (2015), inclusive of the significant topics and interviews. I also collected data from multiple sources and applied methodological triangulation to achieve saturation (see Fusch & Ness, 2015). Using multiple sources of evidence is a major strength of case study research and allows the opportunity for the researcher to corroborate the same finding (Yin, 2018).

Population and Sampling

In qualitative research, the objective of sampling is to obtain data that is useful for understanding the breadth, depth, and context surrounding a phenomenon (Gentles et al., 2015). In this study, I used a purposive sample consisting of three senior leaders of a small nonprofit organization in operation for 65 years in Southern California. Using a purposive sampling method is appropriate when selecting information-rich cases to obtain an in-depth understanding about the topic of inquiry (Baillie, 2015; Gentles et al., 2015).

Researchers often use small sample sizes in qualitative case study research while yielding large amounts of data (Baillie, 2015). Researchers using qualitative inquiry focus on the varying perspectives and opinions of the participants rather than relying on the quantity of participants (Hancock et al., 2016). Researchers have suggested that sample size is deemed sufficient when the researcher obtains data saturation (Gentles et al., 2015). Researchers achieve data saturation when no information or themes emerge from the data (Boddy, 2016; Fusch & Ness, 2015; Hancock et al., 2016; Kline, 2017), which in this study included the review of organizational documents as well as the semistructured interviews. I achieved data saturation when no new themes or information emerged from the data.

Based on Walden University's DBA consulting capstone requirements and protocol, administrators of the university selected and vetted a client organization to participate in the consulting capstone and work directly with me, as a research consultant. Participants chosen for this study included three senior leaders of a small nonprofit organization in Southern California with experience building long-term donor relationships through social media. In addition to the executive director who serves as the client leader for the organization, I used the board president and the director of development as participants in this study.

I directed a series of calls with the client leaders to describe the purpose of the research as well as to request and confirm participation in the study. I obtained a signed consent form, serving as authorization to interview senior leaders, from the client leader via e-mail. Additionally, I asked each identified participant to give his or her consent and confirm his or her voluntary participation in the interview process via e-mail. I conducted a series of semistructured interviews, embedding the interview questions into the 2017-2018 Baldrige Excellence Framework.

Using semistructured interviews, researchers gain a better understanding of the experiences of the participants through their own words and perceptions (Mitchell, 2015).

Conducting interviews provides the researcher with the opportunity to quickly obtain large quantities of data and immediately follow-up for clarification (Marshall & Rossman, 2016). Researchers use interview guides to focus the content discussed in the interview (Abro et al., 2015). I conducted recorded semistructured interviews via phone with three senior leaders using an interview protocol in alignment with the central research question (see Appendix A). I worked with each participant to establish a regular schedule of interviews at their convenience and continued to interview each participant until I reached data saturation. I used methodological triangulation by reviewing data I collected from multiple sources (see Fusch & Ness, 2015). Using methodological triangulation will enhance the findings and validation of the study (Hadi & Closs, 2016; Yin, 2018).

Ethical Research

Through the development of research protocols, researchers provide protection and fair treatment to participants as well as ensure institutional review board compliance of the study resulting in research findings that are ethically and morally sound (Bromley et al., 2015). Prior to contacting prospective participants, I obtained approval from the institutional review board at Walden University (approval no. 04-11-17-0623364). The executive director of my assigned client organization also signed the DBA Research Agreement that outlines the responsibilities of the client organization as well as Walden University.

In high-quality case study research, the researcher will address ethical issues including the acquisition of informed consent from all participants of the study (Taylor &

Thomas-Gregory, 2015). To ensure compliance with the ethical standards of Walden University, I obtained informed consent from all participants via e-mail. Each participant received a separate e-mail in which I outlined the interview procedures, voluntary nature of the study, risks and benefits of participation, privacy rights, as well as contact information for the Walden University representative. Each participant responded to the e-mail individually, consenting to his or her participation. Each participant was aware that if they wanted to withdraw from the study, they could do so at any time by contacting me via phone or e-mail.

Research participants did not receive any incentives or compensation to participate. To protect the identity of the participants, I used alphanumeric codes for each participant, assigned a fictitious name to the client organization, and redacted all identifying information from interview transcripts as well as all other collected data. To ensure confidentiality and to protect the rights of the participants, I stored all information and collected data in a secure and electronic file. After 5 years I will destroy the electronic file.

Data Collection Instruments

The researcher serves as the primary data collection instrument in qualitative research studies (Fusch & Ness, 2015). As the researcher, I served as the instrument for data collection in this study. There are several data collection methods including interviews, observations, as well as analysis of artifacts and documents (Marshall & Rossman, 2016). Interviews are a predominant method of data collection in qualitative research (Oates, 2015). Researchers use semistructured interviews with open-ended questions to understand participants' experiences through their own expressions and perceptions (Mitchell, 2015). In this study, I conducted semistructured phone interviews with three senior leaders using an interview protocol (see Appendix A). I conducted each interview consisting of seven open-ended interview questions supporting the central research question (see Appendix B). I recorded the phone interviews and manually transcribed interview notes in my researcher's journal. In addition to conducting recorded semistructured interviews, I requested organizational documents such as client surveys, organizational policies and manuals, financial statements, and annual reports.

Through semistructured interviews, researchers yield large quantities of data quickly and can have the opportunity to immediately follow-up with participants for clarification (Marshall & Rossman, 2016). As the primary data collection instrument, I enhanced the reliability and validity of the data collection process through regular transcript reviews and member checking. Researchers use member checking to reduce researcher bias and enhance credibility by involving the participant in reviewing the interview transcripts and confirming the results (Birt et al., 2016; Hadi & Closs, 2016). In addition to ensuring the accuracy of the data, researchers use member checking to increase the quality and rigor of their research (Taylor & Thomas-Gregory, 2015). I performed member checking by requesting the participants to review the collected data for accuracy as well as resonance with their individual experiences (Birt et al., 2016; Hadi & Closs, 2016).

Researchers use triangulation to enhance the validity of their studies (Hadi & Closs, 2016; Yin, 2018) as well as the understanding of the phenomenon (Birt et al., 2016). Yin (2018) recommended querying the same participants on multiple occasions. Using methodological triangulation to enhance the validity of this study, I reviewed multiple sources including interviews and organizational documents.

Data Collection Technique

I used semistructured interviews and reviewed organizational documents as the two primary data collection techniques for this study. I did not conduct a pilot study as part of this research. I used an interview protocol (Appendix A) to ensure the focus remained on the content of the interview and that I covered all important topics (Mitchell, 2015). Using semistructured interviews as a data collection technique, researchers can extract rich data as participants share their experiences within the context of the topic (Marshall & Rossman, 2016; Mitchell, 2015). Despite the many advantages afforded to researchers using semistructured interviews, researchers may face quality issues resulting from irrelevant questioning, inappropriate timing, and problematic behavior from participants (Oates, 2015). Researchers can avoid the potential quality issues stemming from semistructured interviews through preparation as well as creating and implementing an interview protocol (Mitchell, 2015).

In addition to conducting semistructured interviews, I obtained and reviewed organizational documents. Organizational documents included client surveys, organizational policies and manuals, financial statements, and annual reports. Researchers must ensure that their review of organizational documents supports the central research question (Marshall & Rossman, 2016; Yazan, 2015). There are many advantages to researchers reviewing organizational documents including the discovery of nuances in the organizational culture, rich data regarding the context, and the facilitation of analysis and triangulation (Marshall & Rossman, 2016). Using methodological triangulation and reviewing the organizational documents allows researchers to obtain valuable background information while supporting the reliability and validity of the study (Hadi & Closs, 2016; Yin, 2018). I used methodological triangulation to enhance the reliability and validity of the study. Researchers use member checking to enhance the credibility of the study (Birt et al., 2016; Hadi & Closs, 2016). I used member checking with each interview transcript and data gathered through the review of organizational documents, addressing credibility within the study.

Data Organization Technique

Researchers use reflective journals to document methodological decisions as well as emergent ideas, concepts, and thinking processes (Hadi & Closs, 2016; Hughes, 2016; Orange, 2016). I maintained a handwritten researcher's journal to document my field notes from interviews and to sustain the practice of reflexivity. In addition to my reflective journal, I maintained a handwritten master journal in which I recorded data collected from participant interviews. I created an individual electronic file for each participant. After each interview, within 24 hours, I created the master journal in an electronic format. I organized all data and supporting organization documentation in a secure data management system. Researchers use data management systems to enhance organization and access to the data (Marshall & Rossman, 2016).

All electronic data and supporting documents will remain secured in a password-protected electronic filing system or in a locked filing cabinet. I will securely store all information and collected data for 5 years in an electronic file. After retaining the data for 5 years, I will destroy the electronic file.

Data Analysis

Providing a thorough account of the data analysis procedures is necessary for the researcher to promote transparency of the research findings and strengthen the conclusions drawn (Hadi & Closs, 2016). For this study, I used methodological triangulation to conduct an analysis of the data derived from multiple sources including organizational documents and senior leader interviews. Using multiple sources of evidence is considered a strength of case study research allowing the researcher the opportunity to substantiate the same finding (Yin, 2018). Using methodological triangulation enhances the results of the study (Hadi & Closs, 2016; Yin, 2018) and increases confidence of the findings since the researcher explored the phenomenon from various perspectives (Baillie, 2015).

The process of manual self-transcription is advantageous as the researcher maintains closeness to the data throughout the analysis stage of research (Mitchell, 2015). I used the manual interview transcriptions to perform member checking and requested each participant to review the collected data for accuracy. Member checking also ensures that the data resonates with the participants individual experiences (Birt et al., 2016; Hadi & Closs, 2016). After validating participant responses, I used content analysis for coding and identify emerging themes within the data. Emerging themes must be relevant to the research question and in alignment with the theoretical framework (Colofari & Evans, 2016; Orange, 2016). I used coding to condense the data, organizing the codes and related information in Microsoft Excel software. The coding process prompts a more profound reflection of the data (Colofari & Evans, 2016). I employed member checking once again to verify the coding of the data with the participants.

After I completed the coding and identification of themes within the data, I correlated the key themes with the conceptual framework. Specifically, Hon and Grunig's (1999) concept for measuring long-term organization–public relationships as well as the 2017-2018 Baldrige Excellence Framework. Furthermore, I associated the themes with recent studies and scholarly literature relevant to building long-term relationships with donors. The process of correlating themes with the conceptual framework and scholarly literature enhances the quality of research (Colofari & Evans, 2016).

Reliability and Validity

Reliability

It is necessary to establish trustworthiness or rigor in qualitative research (Colofari & Evans, 2016). Researchers use the following criteria to establish rigor and quality in qualitative research; dependability, credibility, transferability, and confirmability (Connelly, 2016; Marshall & Rossman, 2016). Dependability refers to the uniformity of the data over time (Connelly, 2016) and researchers can foster dependability in qualitative research by ensuring consistency in procedures with participants over time (Colofari & Evans, 2016). An audit trail of process logs documenting the methodological and analysis activities that occur in the study as well as decisions about the study enhances dependability (Baillie, 2015; Connelly, 2016; Hadi & Closs, 2016). I created an audit trail to address the dependability of this study. In addition to maintaining an audit trail of process logs to enhance the dependability of this study, I employed member checking by asking each participant to review his/her interview transcript for accuracy. Researchers use member checking to ensure dependability in qualitative studies as well as reduce researcher bias (Hadi & Closs, 2016).

Validity

The concept of credibility is parallel to internal validity in quantitative research (Connelly, 2016). Credibility, or the confidence of the truth in the study and therefore the findings of the study, is an essential criterion in establishing trustworthiness (Connelly, 2016). Researchers address credibility by offering context-rich thick descriptions, relating findings to a theoretical framework, exploring negative case analysis or alternate explanations, member checking, and reflective journaling (Colofari & Evans, 2016; Connelly, 2016; Hadi & Closs, 2016; Marshall & Rossman, 2016). To enhance the credibility of this study, I used member checking to validate the data provided by the senior leaders of the client organization. Additionally, I engaged in the process of reflective journaling. Researchers use reflective journaling to provide evidence of continuous review of the data, decisions relative to the process of the study, and to reduce researcher bias (Colofari & Evans, 2016; Connelly, 2016; Hadi & Closs, 2016). Furthermore, I linked the findings to Hon and Grunig's (1999) concept for measuring long-term organization–public relationships as well as the criteria of the 2017-2018 Baldrige Excellence Framework.

In addition to addressing the credibility of a study, researchers have the responsibility to present their findings in a method that permits transferability to other contexts (Connelly, 2016; Hancock et al., 2016; Taylor & Thomas-Gregory, 2015). I ensured transferability of the findings by providing thick and detailed descriptions of the context, participants, and location, as well as promoting transparency in the data analysis process as recommended by Baillie (2015) and Connelly (2016). Furthermore, as suggested by Colofari and Evans (2016), I ensured congruency between the findings of this study and the criteria of the 2017-2018 Baldrige Excellence Framework as well as the conceptual framework, Hon and Grunig's (1999) concept for measuring long-term organization–public relationships. Additionally, I provided future researchers with suggestions on how they may use the findings of this study for further testing.

Parallel to objectivity in quantitative research, confirmability in qualitative research refers to the degree of neutrality in the findings as well as sufficient freedom from researcher bias (Colofari & Evans, 2016; Connelly, 2016). An audit trail of process logs documenting the methodological and analysis activities that occur in the study as well as decisions about the study enhances confirmability (Baillie, 2015; Colofari & Evans, 2016; Connelly, 2016; Hadi & Closs, 2016; Orange, 2016). I addressed confirmability by creating an audit trail. I also used member checking as a strategy to address confirmability by validating the data provided by the senior leaders of the client organization.

Researchers must not only ensure credibility, transferability, and confirmability within their qualitative research, but also, they must reach data saturation. Failure to reach data saturation in qualitative research can have a negative impact on the validity of the research as well as the quality (Fusch & Ness, 2015). Researchers achieve data saturation when no new information or themes emerge in the data collection process (Boddy, 2016; Fusch & Ness, 2015; Hancock et al., 2016; Kline, 2017). Fusch and Ness (2015) noted that interviews are a common method that researchers can use to achieve data saturation in the findings. I interviewed three nonprofit senior leaders using semistructured interview questions, concentrating on the diverse perspectives and experiences of the participants rather than relying on the number of participants, until reaching data saturation. I used methodological triangulation by collecting data from multiple sources (see Fusch & Ness, 2015). Using various sources of evidence is considered a strength of case study research allowing the researcher the opportunity to corroborate the same finding (Yin, 2018).

Transition and Summary

In Section 2, I offered a view of the design of the study and presented the details of the study plan. In this section, I also shared detailed information regarding: (a) the purpose of the study, (b) my role as the researcher, (c) the study participants, (d) the research method and design, (e) population and sampling of the study, (f) ethical research, (g) the data collection instruments, (h) data collection techniques, (i) data organization techniques, (j) data analysis, and (k) the study reliability and validity.

In Section 3, I use the 2017-2018 Baldrige Excellence Framework and embedded interview questions to answer the central research question as well as evaluate performance outcomes for the client organization. I begin Section 3 with the Organizational Profile of the client organization and include a detailed analysis of the following 2017-2018 Baldrige Excellence Framework key management and leadership areas: (a) leadership, (b) strategy, (c) customers, (d) measurement, analysis, and knowledge management, (e) workforce, (f) operations, and (g) results. Furthermore, in this section, I describe the findings of the study, an executive summary of emergent themes, a summary of the project, and contributions and recommendations for future research.

Section 3: Organizational Profile

Key Factors Worksheet

Client A (pseudonym) is a nonprofit organization located in Southern California. Founded in 1952 as a seasonal charity and incorporated as a nonprofit organization in 1957, Client A is a gold-level GuideStar participant organization serving the impoverished youth of Southern California. In their first year, the leaders of Client A served nearly 1,500 children through their Christmas distribution program by providing parents with gifts for their children donated by local organizations and individuals.

Since 1952, the leaders of Client A have served over 1,000,000 children, growing the organization from a seasonal charity distributing gifts at Christmas to a year-round youth enrichment services organization with five primary programs addressing the most critical needs of impoverished children. Offering services and goods tailored to the needs of each child served, the leaders of Client A work to preserve the self-esteem of youth and the dignity of families. Client A is the largest private children's charity in Southern California. The mission and vision of Client A are carried out by the leaders of the organization as well as many volunteers with a passion for serving youth.

Organizational Description

Client A is a 501(c)(3) organization located in Southern California specializing in the delivery of youth enrichment services. Through their year-round and seasonal programs, the leaders of Client A seek to remove the socioeconomic barriers of impoverished children by providing services and goods that address their most critical needs. Through the organization's year-round and seasonal programs, the leaders of

Client A served nearly 120,000 youth and families in 2017.

Organizational environment. A review of Client A's organizational environment including product offerings, mission, vision, values, workforce profile, assets, and regulatory requirements are provided in the following sections.

Product offerings. Client A's product offerings consist of five subprograms housed under the Youth Enrichment Services (YES!) program, all designed to meet the most critical needs of impoverished youth. The five subprograms under YES! include (a) Accessible Services in Action Policing, (b) Adopt a School, (c) Belongings Bags, (d) Birthdays in a Bag, and (e) Holiday Distribution. In addition to the YES! program and subprograms, the leaders of Client A also continue the 65-year tradition of a large-scale holiday delivery through their Christmas distribution program. Through each program, the leaders of Client A provide critical assistance to youth throughout the year through the delivery of goods and services intended to alleviate socioeconomic barriers and remove self-esteem issues for children raised in impoverished settings.

Client A is the only nonprofit organization in select Southern California counties that provides critical assistance to impoverished children at no cost to the family. All items are delivered directly to the children and families free of charge, eliminating the obstacles for families who need assistance the most and are unable to retrieve the items. The leaders of Client A fulfill the communities' needs through a referral system, partnering with other local nonprofits and agencies such as the local police departments and school systems to obtain referrals of children in need.

Through the Accessible Services in Action Policing program, a partnership with a

Southern California Sheriff's Department, the leaders of Client A also provide homeless children and families with housing vouchers to access temporary accommodations in family-friendly hotels at no cost. Additionally, volunteers, and leaders of Client A work with homeless coordinators and local police departments to provide access to critical need items as well as the hotel stays at any time of the day. The leaders of Client A have recognized the need to develop this program in partnership with local agencies further to reach more homeless children and families because the primary purpose of this program is to alleviate the risk to families with children found living in cars or encampments.

Further, through the Adopt-a-School program, impoverished children are provided with backpacks filled with essential items such as shoes, school supplies, and new clothing, promoting youth educational readiness and ensuring that children do not miss school due to lack of supplies and basic needs. Client A partners with local low-income school districts in Southern California counties using a referral system to identify children in need. The school districts work closely with the leaders of Client A, providing them with a daily needs list for children in need. All items that children receive are new and stylish, thereby improving self-esteem and ensuring the children do not feel marginalized because they are receiving assistance.

The leaders of Client A also developed the Belongings Bags program to provide critical assistance to children in some of the worst situations. The bags are high-quality duffel bags filled with the necessary items to meet children's basic needs including clothing, socks, shoes, hygiene products, books, toys, blankets, and other various items upon request of the partnering agency. Typically, children in transition from dysfunctional homes to foster care, abused children admitted to inpatient facilities, children attending a sponsored summer camp, and those who are in foster care or shelters will receive the bags. The leaders of Client A provide the bags upon request from local partners such as foster care agencies, hospitals, child protective services, and youth camps.

Additionally, the leaders of Client A partner with schools, women's shelters, and prequalified nonprofit organizations for the Birthdays in a Bag program. The staff of the partner organizations provides the leaders of Client A with a list of children including their names, genders, and birth dates a month in advance. Each bag has the child's name on it and is filled with items to celebrate the child's birthday such as a cake mix, pan, frosting, party favors, toys, and other necessary items.

The Holiday Distribution program developed by the leaders of Client A also supports children partaking in the traditional holidays throughout the year including Thanksgiving, Christmas, Easter, Halloween, and Valentine's Day. The items provided to children are intended to meet their basic needs. The children receive the essential need items through various community and nonprofit partners that reach out directly to the leaders of Client A indicating a need.

Through Client A's flagship Christmas Distribution program, the leaders provide new and trendy clothing, toys, shoes, personal hygiene items, books, quilts, and blankets to children and families in need at Christmas time. This program differs from the Holiday Distribution program under YES! because the distribution of the items occurs directly to the families at Client A's warehouse rather than the delivery occurring indirectly through partnering organizations. Families are invited to participate in the Christmas Distribution program through a referral program with partnering school districts, county agencies, and other nonprofit organizations. The Christmas Distribution program serves nearly 15,000 families and children each year. Additional product is donated to partnering nonprofit organizations and local agencies in need during the holidays.

Mission, vision, and values. Client A's leaders are committed to providing critical support to youth by empowering families through seasonal and year-round programs. The shared vision among the leaders of Client A is to see the capacity of the organization grow to servicing 225,000 children, annually, by the year 2022. The leaders of Client A incorporate the values into the daily practices in the organization (Table 2).

Table 2

Mission, Vision, and Values

Mission
To provide critical support to children by supporting and strengthening the family unit through community-based programs.
Vision
To serve 225,000 children, annually, by the year 2022.
Values
Treat each family served with dignity and respect. Maintain sensitivity to the diversity of the families we serve. Provide the most effective assistance to low income families in the local communities. Stay a most reliable partner to all stakeholders. Strong commitment to taking steps to assist in the eradication of poverty. Respond quickly and efficiently to those in need. Develop and nurture volunteers. Maintain transparency and accountability to stakeholders. Strong commitment to adhering to high standards of integrity and honesty. Dedication to caring for those who are living in poverty. Maintain a high level of creativity in program development to serve the communities.

Workforce profile. The compensated workforce of Client A includes two full-time employees, the executive director and director of development, and one part-time support staff member. The senior leaders of Client A must hold a minimum of a bachelor's degree and commit to ongoing leadership development training. Preferably, senior leaders will have experience writing grants. There are no specific educational requirements for the part-time support staff. However, part-time paid employees complete ongoing, internal training related to their areas of responsibility.

Client A's workforce also includes over 125 regular volunteers in various positions all related to achieving the mission of the organization. The workforce also includes over 1,200 volunteers who serve the organization occasionally through third-party vendors, companies, or groups. The leaders of Client A provide an orientation and ongoing training to volunteers related to their area of responsibility. All workforce members both paid and volunteer complete internal training regarding Occupational Safety and Health Association regulations. The volunteers of Client A are a tenured team and choose to dedicate their time to Client A because they believe in the mission of the organization. The leaders of Client A acknowledge that as the current volunteer workforce is aging, the search for strong replacements devoted to the success of the mission of the organization is a necessity.

Assets. The leaders of Client A operate out of a 6,000-square-foot warehouse located in a select county in Southern California. In addition to the primary warehouse, there is a secondary storage area that consists of 31 shipping containers used for storing in-kind donations until the product is ready for distribution. Administrative space is located within the warehouse; however, staff and volunteers have the option to work from home. Meetings with staff and volunteers are held at the warehouse facility every Wednesday via telephone or at various public venues. Children and families receive assistance on site during the annual Christmas distribution or through individual partnering agencies offsite locations. The leaders of Client A are addressing the need for software to assist in managing customer relations, volunteers, and inventory as well as security systems for the warehouse.

Regulatory requirements. As a fully operational and licensed nonprofit organization, Client A adheres to various regulatory requirements. The leaders of the organization ensure that the operations follow all labor standards, the Americans with Disabilities Act, and Occupational Safety and Health Association requirements. The leaders of Client A comply with all requirements of nonprofit organizations operating under the 501(c)(3) registration as well as the completion of 990 tax forms and regulations annually. Additionally, the leaders of Client A must ensure that the operations of the organization comply with all standards and regulations as required by their grantors. Furthermore, to increase transparency and meet the minimum requirements for various grant applications, the leaders of Client A began third-party financial audits in 2018 for the 2017 tax filings.

Organizational relationships. A review of the organizational relationships associated with Client A including organizational structure, customers, stakeholders, suppliers, partners, and collaborators are provided in the following sections.

Organizational structure. The board of directors (BOD) is responsible for the governance of Client A in conjunction with the executive director of the organization.

The BOD selects members so that they may provide governance based on their area of professional expertise, adding to the strength and versatility of the board. The executive director is responsible for all operations of the organization and seeks support in achieving the organization's mission from the director of development, one part-time support staff member, various volunteers, and third-party service providers. Figure 1 depicts the organizational and governance structure of Client A.

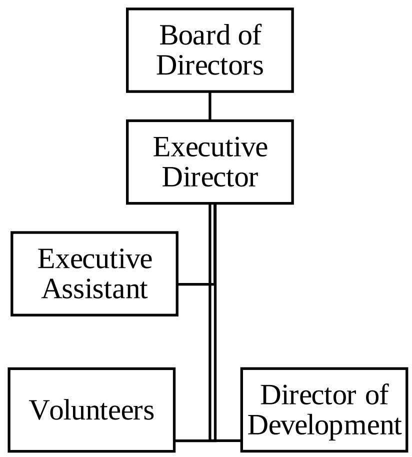


Figure 1. Client A's organizational chart.

Customers and stakeholders. The customers of Client A include impoverished children, ages 17 and under, as well as homeless families in the market segments of select counties in Southern California. Additionally, the leaders of Client A manage a robust stakeholder group within consistent market segments as their customers. Table 3 displays the key requirements of the customers, stakeholders, and market segments served by the leaders of Client A.

Table 3

Customers and Stakeholder Requirements

Customers	Key requirements
Impoverished children and families	Access to reduced or free services, timely delivery of services, individualized care, transparent communication
Stakeholders	Key requirements
Workforce	Strong leadership, opportunities for training and development, safe and accessible work environment, transparent communication, mission alignment, strategy achievement
Board of directors	Ethical behavior, mission alignment, transparent communication, strategy development and achievement
Partners	Mission alignment, transparent communication, strategy achievement
Donors	Mission alignment, transparent communication, strategy achievement
Community	Access to services, mission alignment, transparent communication, strategy achievement

Suppliers and partners. The leaders of Client A have secured indispensable partners and collaborators essential to mission fulfillment and the development of new and innovative programs for the organization. The leaders of Client A nurture existing partner relationships and develop new collaborative partnerships through consistent communication via e-mail, phone, social media, and face to face. Table 4 depicts the key suppliers, partners, and collaborators of Client A, their primary function in serving the organization, and their influence in the innovation process.

Table 4

Client A's Key Suppliers, Partners, and Collaborators

Suppliers, partners, and collaborators	Role	Influence on innovation and competitiveness
Funding	Provides programmatic financial support	Funding partners provide enough financial support enabling the leaders of Client A to develop new programs addressing the most critical of needs as well as fully operate existing programs at no cost to the recipients
Product	Provides in-kind donations for distribution	Product partners supply Client A with adequate in-kind donations to provide goods at no cost to the impoverished children
Shipping	Provides free distribution of product through existing deliver channels	Shipping partners offer logistical and warehouse knowledge to most efficiently distribute goods to impoverished children
Agency	Works with senior leaders in identifying and referring at-risk youth	Agency partners communicate the mission of Client A with other vested community members and promote programs
Volunteer	Provides a variety of services to assist in mission fulfillment including sewing, inventory management, distribution, and data entry	Volunteers offer feedback and suggestions for new and innovative program offerings

Organizational Situation

Competitive environment. A review of Client A's organizational environment including competitive position, competitiveness changes, and comparative data are provided in the following sections.

Competitive position. Client A is the only nonprofit organization in a select Southern California county that provides critical assistance to impoverished children at no cost to the family, including delivery of the items. Volunteers deliver goods directly to families or to partner organizations with connections to the families to ensure that families do not incur a cost for retrieval of the items. Furthermore, Client A is the only nonprofit organization in the area that offers goods and services, tailored to each child's specific needs. The leaders of Client A ensure that each item delivered to a child in need is relevant in meeting a critical need as well as fulfilling the mission of the organization. Other youth enrichment nonprofit organizations in the select counties within Southern California do not provide the same vital assistance to impoverished children free of charge. The items and services offered to children and families through the programs created by the leaders of other youth enrichment nonprofit organizations in the area are fee-based or a requirement exists that families access the services directly.

Competitiveness changes. Changes in funding provided by individual donors would have a considerable impact on the ability of Client A's senior leaders to fulfill the mission of the organization, address future goals, and meet specific financial needs of the YES! program. The leaders of Client A acknowledge the need to increase their base of individual donors and recurring financial supporters. In addition to increasing the individual donor base, the leaders of Client A recognize the need to implement an inventory management system, including additional paid staffing, to improve the efficiency of warehouse operations and record keeping of inventory. Improving warehouse operations and efficiencies are vital to the ability of Client A's senior leaders to meet their long-term vision of servicing 225,000 children, annually, by the year 2022.

Comparative data. The leaders of Client A have difficulty obtaining comparative data. Senior leaders obtain the necessary resources to provide goods and services to impoverished children free of charge as compared to other youth enrichment service organizations in the local area where services and products come at a cost to the recipient. However, the leaders of Client A do use youth-based data to set the strategic direction of the organization regarding program offerings. Sources used by senior leaders include kidsdata.org, a website providing information on the health and well-being of children in the state of California, as well as data provided by leaders at the local school districts regarding need. Additionally, senior leaders do use comparative data for staff compensation taking into consideration other like-size nonprofits, the position, and location.

Strategic context. Focused on mission fulfillment, the leaders of Client A continually seek methods to address their key challenges while leveraging key advantages of the organization. Senior leaders recognized four key challenges within the areas of business and operations that could affect the leaders' ability to expand services to the growing numbers of children in need. Leaders identified five key advantages within the areas of business, workforce, and societal responsibilities. Table 5 displays Client A's key strategic challenges and advantages.

Table 5

Key Strategic Challenges and Advantages

Area	Key challenge
Business	Limited organizational capacity to manage processes, data collection, and work systems, limited funding from individual donors
Operations	Limited warehouse space to accommodate the large volume of incoming in-kind donations

Area	Key advantage
Business	Volume of in-kind donations resulting in free delivery of service to impoverished children, positive reputation within the community, strong relationships with key partners, suppliers, and collaborators
Workforce	Large base of consistently engaged and dedicated volunteers
Societal responsibilities	Mission supports positive social change

Performance improvement system. The leaders of Client A use survey data as the primary instrument in their performance improvement system to measure the overall effectiveness of programs and services. Senior leaders administer annual impact surveys to collect qualitative and quantitative data for children receiving services using a Likert-scale questionnaire. Leaders at partnering schools receive the surveys and respond to a series of questions measuring five primary areas of improvement for students receiving services: behaviors, engagement, self-esteem, grades, and attendance. The leaders of Client A use the results to determine if the current programs are effective and beneficial to individuals receiving the services, to indicate mission fulfillment, and to identify opportunities for improvement. In addition to impact surveys, senior leaders administer product service satisfaction surveys to the families and children during the annual holiday distribution event to ensure the quality of products is satisfactory. Senior leaders also receive needs assessment forms from local agencies and nonprofit partners in need of services and goods. The data collected from the needs assessment forms and product service satisfaction surveys is used to revise the products that the leaders of Client A distribute to children and partnering organizations.

Leadership Triad: Leadership, Strategy, and Customers

Leadership

Senior leadership. A review of how leaders at Client A set the mission, vision, and values, ensure legal and ethical behavior, engage and communicate with the workforce, foster an environment for success, and create a focus on action are provided in the following sections.

Mission, vision, and values. The BOD, executive director, and director of development comprise the senior leadership team of Client A. Members of the board are selected based on their alignment with the mission, vision, and values of Client A; their potential professional contributions, and their ability to advise the executive director, and their congruence with the board member profile. Several board members have participated with the organization for several years, driving the mission and providing leadership in the areas of finance and accounting, legal guidance, education, and consulting. The executive director has served Client A in the current capacity since 2012, however, previously worked in a volunteer capacity for over 30 years. Client A’s current director of development has worked for the organization for one year.

Senior leaders set the mission, vision, and values of Client A in 1952. Client A's original mission of providing critical support to impoverished youth remains unchanged today. However, senior leaders realigned the vision in 2012 by implementing year-round services to support youth throughout the year. Decisions regarding additions or changes to existing programs come from senior leader, including approval and support from the BOD. The senior leadership team is responsible for communicating the mission, vision, and values to the volunteers, partnering schools and agencies, and families. Senior leaders of Client A publish the mission, vision, and values on the organization's website, social media accounts, GuideStar, and internal publications.

Legal and ethical behavior. Senior leaders set the standards for legal and ethical behavior at Client A. There is a code of conduct that employees and volunteers must comply with at Client A. Additionally, the code of conduct is in Client A's 2018 employee handbook for reference and staff must sign an acknowledgement of receipt and understanding. Senior leaders promote legal and ethical behavior through transparency, providing impact reports to staff, volunteers, partners, donors, and the community. In 2018, the senior leadership team elected to have a third-party firm conduct an audit of Client A's 2017 financials. Furthermore, when considering new partnerships, the senior leaders of Client A ensure alignment of legal and ethical standards among current partners as a means of promoting ethics.

Communication. Senior leaders at Client A understand the impact of strong working relationships on mission fulfillment. Therefore, senior leaders prioritize building and maintaining relationships with the workforce, partner agencies, donors, and the community by executing trust-building communication strategies. Senior leaders make every effort to communicate often, consistently, and transparently to staff, volunteer department leaders, and volunteers. Regular communication occurs in person at volunteer and staff meetings, via telephone, social media, and e-mail. Senior leaders communicate with partners, donors, and the community in-person at organizational events, networking events, e-mail exchanges, meetings, quarterly newsletters, direct mail campaigns, warehouse tours, and social media (Table 6). Senior leaders encourage feedback and two-way communication from all stakeholders with every opportunity for engagement and relationship building. Every interaction is an opportunity for senior leaders or members of the volunteer workforce to reinforce the mission, vision, and values of the organization.

Table 6

Client A Communication Channels and Strategic Outreach

		Purpose		Audience				
Method	Frequency	Two-way communication	Deploy mission	Workforce	Partners	Donors	Community	Customers
Board meetings	P	•	•	•				
Department meetings	M	•	•	•				
Direct mail	O		•		•	•	•	•
E-mail	D	•	•	•	•	•	•	•
Facebook	D	•	•	•	•	•	•	•
Impact report	A		•	•	•	•	•	•
Newsletters	Q		•	•	•	•	•	•
Networking events	O	•	•	•	•	•	•	
One-on-one meetings	O	•	•	•	•	•	•	
Open houses	A	•	•	•	•	•	•	
Orientations	P	•	•	•				
Phone	D	•	•	•	•	•	•	•
Special events	BA	•	•	•	•	•	•	
Surveys	A	•			•			•
Volunteer luncheon	A	•		•				
Warehouse tours	M	•	•	•	•	•	•	
Website	O	•	•	•	•	•	•	•

Note. Frequency: A = Annually, BA = Biannually, M = Monthly, Q = Quarterly, D = Daily, O = Ongoing, P = Periodically

Environment for success. Senior leaders foster and promote an environment for continued success at Client A. At Client A, the senior leaders believe that when positive attitudes start at the top, a ripple effect will occur throughout the organization. An expectation exists that all employees, board members, and volunteers maintain the integrity and reputation of the organization through their actions and by honoring commitments to their customers. Participant 1 noted the positive reputation of Client A in the community as a driving force behind the success of the organization.

Senior leaders acknowledge the value of their volunteer staff to the success of the organization. Several of the volunteers have worked with Client A for multiple years with a select few dating back to the origination of the organization. The beliefs and actions of volunteers align with the mission and vision of the organization and therefore, contribute to the reputation of Client A ensuring an environment for future success. The senior leaders of Client A consistently recognize volunteers for their contributions via social media, posting pictures and videos of the volunteers in action.

Focus on action. The senior leaders at Client A create a focus on action by delineating clear expectations for everyone, including volunteers serving in a departmental leadership capacity. The executive director is primarily responsible for the operations of the organization, managing volunteers, and establishing and building partner relationships. As the most tenured leader at Client A, the executive director executes the 5-year strategic plan creating change that allows the staff and volunteers to achieve the mission of the organization. Senior leaders have identified that at times, older volunteers struggle with changes in processes and operations. However, the volunteers adapt to the changes because they understand that the changes are necessary for mission fulfillment.

Governance and societal responsibilities. A review of Client A’s organizational governance, performance evaluation process, legal and ethical behaviors, and societal responsibilities to the community are provided in the following sections.

Organizational governance. The BOD provides governance at Client A with each member having defined roles and responsibilities. Client A’s 2018 official board policies manual outlines the expectations, roles, and responsibilities of the governing board. Additionally, the manual contains information regarding the shared values of the organization, board size and structure, and the roles and responsibilities of the executive director. Current board members recruit and nominate prospective members based on their alignment with the mission, vision, and values, the professional skills that they may use to serve and benefit the organization, and their ability to advise the executive director. Further, board member criteria include; integrity and high ethical standards, duty of loyalty, contribution, sharing, commitment, and understanding.

The board does not engage in the daily operations of the organization; instead, the executive director who is selected by the board, is responsible for the daily operations and achievement of the strategic plan. The executive director attends the bimonthly meetings with the board, ensuring that the conversation remains focused and providing updates to the BOD regarding organizational and programmatic performance. In addition to providing governance, the board is responsible for monitoring the performance of the organization, evaluating the executive director, contributing to fundraising, setting the strategic direction in conjunction with the executive director, improving organizational policy, ensuring financial compliance in accordance with laws and good practice, evaluating board performance, and advocacy for the organization.

Performance evaluations. Per Client A's 2018 employee handbook, staff should receive an annual written performance evaluation. Evaluations of staff should include feedback on the following factors; quality of job performance, attendance, dependability, attitude, cooperation, compliance with employment policies, and year-over-year improvement in job performance. The executive director is responsible for providing feedback to the other members of the senior leadership team and the staff reporting to her. The BOD is responsible for providing feedback to the executive director. Board members evaluate the executive director's performance based on achievement of organizational goals and operations within the boundaries of prudence and ethics. The BOD will invite feedback from staff and stakeholders who have interacted with the executive director. The BOD will provide feedback to the executive director in person. However, senior leaders acknowledged the need for compliance with the performance evaluation policy. The executive director indicated that the inconsistency with administration of formal performance evaluations at the senior leader level is because of the small size of the leadership team and the infancy of the director of development position.

The board is responsible for performing annual self-assessments of BOD performance. The executive director is highly involved with the BOD and provides ongoing feedback to members in a collaborative effort to enhance communication and mission fulfillment. The board is small in membership and therefore, matters of unsatisfactory performance are handled on an individual basis by other board members and may involve the executive director.

Legal and ethical behavior. Ethical behavior in all interactions is an expectation created by senior leaders and practiced by all staff and volunteers at Client A. Senior leaders are present in the warehouse and during distribution events to oversee interactions with customers. Leaders believe that integrity and ethics are the driving forces in maintaining a superior reputation within the community. Senior leaders at Client A practice a nondiscriminatory approach, providing support to all children in need who meet the key requirements of the programs.

Senior leaders promote ethical behavior in all interactions by practicing the shared values of the organization. All children and their families receiving support are treated with dignity and respect in their interactions with staff and volunteers at Client A. Senior leaders ensure that partners view the organization as reliable through good stewardship, ensuring effective use of every resource from in-kind donations of products to keeping administrative expenses to a minimum. Volunteers effectively distribute all donated products to children in need or other nonprofit partners in need, resulting in zero waste of product. Additionally, senior leaders are quick to respond in emergent situations, responding immediately when a referral is received, even if it requires the personal delivery of product outside of operating hours. Senior leaders believe that transparency, accountability, and consistency in messaging with the community and all partners is critical to sustaining operations and reaching the goal of increased distribution and children served.

Senior leaders minimize potential legal and regulatory concerns with products and from the community by complying with required regulations. Some of the funding that the senior leaders acquire for the organization is from restricted grants. Therefore, senior leaders must comply with the regulations and stipulations outlined within the grants. Because of the nature of Client A's services, providing support to children and families at no cost, complaints or concerns with the products or from the community are rare and undocumented. However, senior leaders administer product service satisfaction surveys to collect data regarding the quality and level of satisfaction with the products and services received by the family.

Societal responsibility and community support. Benefitting and improving the well-being of society is inherent in the mission of Client A. The mission of Client A is to provide critical support to impoverished youth by empowering families through year-round and seasonal programs. The immediacy with which leaders and volunteers respond to the needs of children is a contributing factor in improving economic conditions for the families. Furthermore, outcomes relative to the YES! program, captured through the annual impact surveys, indicate improved attendance, grades, engagement, and self-esteem among children receiving services.

The senior leaders of Client A continually seek input and feedback with community partners to understand better the urgent social problems and to develop solutions and programs that will meet the children's critical needs. Local agencies and community partners submit needs assessment forms indicating the desired products and services that will meet the needs of the children. Recent feedback and inquiries led to an expansion of services into additional counties within Southern California. Senior leaders communicate frequently with various partners, including those providing funding, shipping services, and in-kind product donations as well as local agencies and volunteers to develop and nurture relationships (Table 6). The services provided by senior leaders at Client A directly benefit the impoverished children and their families in Southern California. Indirectly, partnering nonprofit agencies and their constituents receive benefit through donated products that the senior leaders of Client A do not distribute to their primary customers. Additionally, the act of giving the undistributed products to partnering nonprofits ensures that product is not wasted or disposed of improperly, thereby creating an environmental impact.

Strategy

Strategy development. A review of Client A's strategy including information regarding the strategic planning process, focus on innovation, work processes and systems, and strategic objectives are provided in the following sections.

Strategic planning and focus on innovation. Senior leaders and the BOD revisit the strategic plan every 5 years. Client A's 2012-2017 strategic plan was set at the strategic planning meeting in the summer of 2017. However, the strategic planning process at Client A is ongoing. Board members and senior leaders meet annually to discuss the strategic direction of the organization. Annual meetings begin with a discussion of the state of the organization, including a review of the current mission, vision, and values. Next, the committee conducts an analysis of the strengths, weaknesses, opportunities, and threats of Client A. The information gleaned from the strengths, weaknesses, opportunities, and threats analysis is used by the committee to develop long-term strategic objectives with a focus on opportunities for innovation in the delivery of services and partnerships. Additionally, the committee develops strategies to leverage the strengths of the workforce and overcome potential threats. At the 2017 strategic planning meeting, the committee set the vision of servicing 225,000 children, annually, by the year 2022. Senior leaders and the BOD have tentatively scheduled the next meeting for the fall of 2019.

The strategic plans at Client A can be amended at any time by senior leaders because the planning process is fluid and ongoing. However, leaders strive to align the strategic objectives with the mission of the organization. Senior leaders recognize the need for additional in-depth conversations, the development of actionable items assigned to board members and staff for implementation, and the formation of task groups to monitor progress. To aid in the achievement of strategic objectives, senior leaders acknowledge the need for more comprehensive data collection relative to measurable objectives and results. Formal agendas and meeting minutes exist for each annual strategic planning meeting.

Key processes and work systems. Senior leaders consider the capacity of the workforce, the current corporate partnerships, and the needs of the children when determining the completion of key processes both internally and those completed externally by suppliers and partners. Distribution of in-kind product donations is the primary process that is handled externally by corporate partners of Client A. Senior leaders along with the rest of the workforce internally completes all other key processes.

Senior leaders at Client A are successful because of the key work systems that are in place. Key work systems include intake, inventory management, acquisition of funding and in-kind donations, and business support. The executive director and director of development are primarily responsible for funding and in-kind donation acquisition as well as business support. The completion of all other key work systems at Client A is the responsibility of the entire workforce comprising 125 regular volunteers and 1,200 additional volunteers. Senior leaders will not engage the workforce in key work systems that do not positively impact the achievement of the mission and vision of the organization.

Strategic objectives. Senior leaders, along with the BOD, set strategic objectives in the annual strategic planning meeting. All strategic objectives support the mission of the organization and the vision of servicing 225,000 children, annually, by the year 2022. While some objectives are long-term, others are short-term and designed to assist in meeting longer-term objectives. Fewer strategic objectives results in competing objectives distracting senior leaders from achieving the mission and vision. Table 7 displays the strategic objectives, goals, action plans, timelines, and where determined, measurements of achievement for Client A.

Table 7

Strategic Objectives and Timelines

Objectives	Strategies	Goals	Action plans	Measures and timelines
Funding				
Increase funding to support programmatic growth	Donors	Increase donor community: individual and corporate	Strategic social media plan; branding strategy	$1,000,000 raised annually by 2022, with a focus on repeat donors; Bloomerang mailing list of 5,000 by 2022
	Grants	Increase funding through grants	Effective grant writing	
Staffing				
Increase organizational capacity through additional staffing	Fundraising capacity	Hire following positions: contract grant writer, director of corporate sponsorships, social media manager	Sustainable fundraising plan	Hire key positions by 2020
	Warehouse management capacity	Hire warehouse manager	Inventory management system	Hire position by 2020; deploy inventory management system; increased inventory capacity to 100,000 square feet by 2022
	Volunteer management capacity	Hire volunteer manager	Volunteer management system	Hire position by 2020; increased volunteer base
Service				
225,000 children served annually by 2022	YES! program expansion	Expand services to additional counties in Southern California	Identify and form partnerships with agencies	Deploy services in two additional counties in 2020
	Increase capacity via staffing, volunteers, and partnerships	Secure, retain, and develop staff and volunteers	Staff and volunteer recruiting, retention, and succession plans	150 partnerships by 2022; increased volunteer base; additional staff positions
	Increase warehouse capacity	Acquire suitable facilities, pod systems		Increased inventory capacity to 100,000 square feet by 2022; increased daily operations to six days per week

Strategy implementation. A review of Client A's strategy implementation including information regarding action plans and deployment, resource availability, workforce plans, performance projections, and modified action plans are provided in the following sections.

Action plans and deployment. Senior leaders, along with board members, develop action plans supporting the strategic objectives and goals that align with the mission of the organization. Specifically, senior leaders developed short and long-term action plans to achieve the strategic objectives supporting the vision of providing services to 225,000 children, annually, by the year 2022. Leaders design action plans, timelines, and measurements after reviewing information from the annual strategic planning meeting and various performance outcomes (Table 7). Workforce capacity and capability is a consideration in establishing action plans. Senior leaders are responsible for the implementation and execution of the action plans at Client A. Using various communication channels (Table 6), volunteer department heads are debriefed and when applicable, assist in the deployment of action plans. The workforce provides feedback and input into best practices that may alter action plans to successfully achieve the mission of the organization.

Resource availability and workforce plans. The leaders of Client A secure enough funds and in-kind products annually to maintain the current distribution of goods to children in need, year after year, and to fulfill the mission of the organization. Unrestricted funds cover administration costs, which are kept to a minimum, to ensure that senior leaders can allocate most of the funds to program operations. However, additional commitments of service delivery and programmatic expansion will require the acquisition of other funds and in-kind product donations from business partners. Senior leaders, while excited about the projected growth of the YES! program, exercise caution to ensure that the funds are available to support the anticipated growth.

Human resources are one of Client A's most valuable assets. In addition to long-term board members and a tenured executive director, senior leaders have cultivated a strong workforce of regular volunteers. Many of the regular volunteers are also tenured in their positions with Client A, having served the organization for many years in a variety of capacities all aiding in mission fulfillment. Additional volunteers who serve Client A in a singular capacity include employees from local businesses and schools as well as members of the community. Senior leaders recognize that achieving the strategic objectives of Client A will require investing in the workforce by adding additional paid staff as well as recruiting other regular volunteers.

Performance projections and modified action plans. Senior leaders at Client A do not track performance explicitly related to action plans. Instead, senior leaders use the number of children served annually as well as the results of the annual impact surveys as indicators of achievement and effectiveness. Senior leaders at Client A are projecting to impact 125,000 children in 2019 and plan to service 225,000, annually, by the year 2022. Regarding impact survey outcomes, senior leaders expect to achieve incremental increases in outcomes each year. Senior leaders at Client A understand the importance of flexibility. Given the mission, providing critical needs to impoverished youth, flexibility is inherent in their daily actions. Should a plan need altering due to changing needs or performance, senior leaders adjust accordingly to support the mission.

Customers

Voice of the customer. A review of Client A's current and potential customers, customer satisfaction, and engagement are provided in the following sections.

Current and potential customers. The current and potential customers of Client A are impoverished children and their families in select counties within Southern California. Because the customers are minors, direct interaction with current and potential customers with leaders and volunteers is limited. In addition to the methods listed in Table 6, senior leaders rely on partnering agencies to act as the voice of the customer. Leaders from partnering agencies such as school districts, other partnering nonprofit organizations, and other local agencies provide information to Client A regarding the needs of the children and their families. Opportunities for interactions with leaders from partnering agencies are frequent and often occur in-person or via e-mail, telephone, or social media. Social media is an outlet that current and potential customers can use to provide input directly to the leaders at Client A. Should a current or prospective customer comment on social media or send a direct message, senior leaders will respond.

Customer satisfaction and engagement. The quality of products that customers receive, and their level of satisfaction is highly important to the senior leaders at Client A. Senior leaders administer surveys to collect data regarding the quality and level of satisfaction with the products and services received by the family during the annual holiday distribution event. Senior leaders prepare surveys containing predetermined questions using a Likert-scale system that parents can use to rate their level of satisfaction. The survey also includes space for parents to provide open-ended responses with additional comments or suggestions. Senior leaders use the collected data to make decisions regarding the quality and type of products that customers receive during the event. Senior leaders review each survey, discuss the results, and adjust product offerings accordingly to ensure a high level of customer satisfaction. The survey results indicate a high level of satisfaction with the quality and availability of products. Senior leaders do not address customer engagement through the survey.

In addition to the formal survey process, senior leaders receive feedback from customers via social media. As customers engage via social media, senior leaders prioritize responding to each comment on the Facebook page. Senior leaders obtain the necessary resources to provide goods and services to impoverished children free of charge as compared to other youth enrichment service organizations in the local area where services and products come at a cost to the recipient. Therefore, senior leaders do not use comparative data regarding the satisfaction levels of their customers should they receive services from another youth enrichment nonprofit entity.

Customer engagement. A review of Client A's customer engagement including information regarding product offerings and customer support, customer groups and market segments, and relationship and complaint management are provided in the following sections.

Product offerings and customer support. Senior leaders determine the products offered by Client A based solely on the needs of the children in alignment with the mission of the organization. Continually, senior leaders review needs assessment forms submitted by leaders from local partners such as school districts, police agencies, and other nonprofit partners. Senior leaders gather and review data, then determine what products and programs are needed to meet the most critical of needs of the children. Senior leaders ensure that the products children receive are of high quality and relevant to the season and fashion trend. Children receive services and products that are tailored to their individual needs.

Additionally, senior leaders review the viability and the applicability of the programs offered by Client A. Administrators of partnering agencies complete impact surveys for the organization providing valuable data that senior leaders use in programmatic and product decision making. If leader determine that a child is not benefitting from a program or product, senior leaders may decide to suspend the program or product from the offerings of Client A. Similarly, leaders may determine that additional products or programs would benefit the children. Client A began in 1952 as a seasonal charity distributing gifts at Christmas and transformed to a year-round youth enrichment services organization with five primary programs addressing the most critical needs of impoverished children.

Customers can seek support and learn about the services offered by Client A through multiple channels. Client A operates fully on a referral system. Therefore, as customers seek information via telephone, social media, e-mail, or the organizational website, they are redirected to partnering agencies such as the school districts and various nonprofit agencies to complete a referral form. The organizational website and Facebook page that senior leaders established provides information about the referral process. If potential customers inquire about the services of Client A via messaging or comments on the Facebook page, senior leaders respond and provide information regarding the referral process. Similarly, senior leaders developed a standard message with information regarding the referral process that potential customers will hear when attempting to leave a message for Client A via telephone. Due to operating on a lean infrastructure, senior leaders are unable to return the phone calls of each potential customer.

The referral process is an essential step in acquiring services from Client A. Through the referral system, senior leaders receive the necessary information to assess the needs of the children, ensure that the customer meets the qualifications to receive services, and guarantee equitable access to programs across all customer groups. The referral process exists for all programs offered by senior leaders at Client A. Potential customers of the Christmas Distribution program will complete the same referral process to access services at Christmas time as those customers seeking year-round support.

Customer groups and market segments. Based on the mission of Client A, senior leaders focus on their primary customer group, the children and their families who are in need. Any child below the poverty level in the select Southern California counties may receive services from Client A. Senior leaders do not have any plans within their strategy to alter the mission and serve other customer groups. Senior leaders also select market segments based on the needs of the community. Until 2019, the services offered by senior leaders at Client A were only available to residents of one county in Southern California. However, based on need and positive word of mouth, school district leaders in a nearby county approached Client A regarding a partnership and expansion of services. Senior leaders commenced the process of expanding services into this new county based on the needs of the potential customers, the ability of senior leaders to meet those needs, and the vision of servicing 225,000 children, annually, by the year 2022. Although the expansion into an additional county is recent, expanding services to new markets means further mission fulfillment for the organization and additional opportunities for senior leaders in building new partnerships and relationships.

Relationship and complaint management. Strong relationships built upon trust through positive interactions and consistent communications are essential to senior leaders at Client A, and necessary for the sustainability of the organization. Because of the sensitive nature of the primary customer group, impoverished children, senior leaders do not focus on building or managing relationships with the children and their families. Additionally, interactions with the children and their families are often singular or nonexistent as they receive services and products through partner agencies such as school districts or police municipalities. Therefore, senior leaders actively pursue and manage relationships with all their partners, including shipping, grantors, donors, local agencies, and the community. Senior leaders build relationships through personal interactions and communications, including in-person at organizational events, e-mail exchanges, meetings, and social media.

Senior leaders use social media frequently to communicate and interact with their partners and the community daily. Participants 1 and 2 stated that leaders frequently post messages thanking funding partners for their contributions to the organization as an example of how they use social media for engaging partners and building long-term relationships. Participant 1 commented further on this strategy, stating that the partners appreciate public recognition and acknowledge their gratitude through repeat donations and additional engagement with the leaders of Client A via social media.

Participant 3 noted the significance in using social media to establish new relationships with volunteers and donors of all ages. Senior leaders recognize that social media are effective platforms for communication and relationship building with their partners and the community, and therefore, are taking steps to leverage the use of social media further. Participant 1 discussed the importance of having a dedicated staff member whose responsibility would include social media management. All participants identified opportunities to leverage social media, including actively using additional platforms, tracking and leveraging donor engagement, and the collection and use of social media-specific data.

Because of the nature of Client A's services, providing support to children and families at no cost, complaints and concerns with the products or from the community are rare. However, when complaints are received, senior leaders are quick to respond. Participant 2 mentioned that they received two complaints from parents who were at the warehouse shopping for their children during the 2017 holiday distribution event. The parents indicated their dissatisfaction with the selection of products available. Senior leaders who were at the event quickly managed the situation by communicating individually, with each parent, regarding the variety of products available.

Results Triad: Workforce, Operations, and Results

Workforce

Workforce environment. A review of Client A's workforce environment including information regarding workforce capabilities and capacity, workplace environment, and workforce support are provided in the following sections.

Workforce capabilities and capacity. Senior leaders make decisions regarding workforce capacity and capability needs as guided by the mission and vision of the organization. Senior leaders assess the needs based on the workforce's ability to meet the current delivery of service requirements. When considering capacity, sustaining the quality of products and delivery of service is of utmost importance to senior leaders. Senior leaders will not make additional commitments beyond the capacity or capability of the workforce if it results in comprising the quality of service. The current workforce, paid and volunteer, is adequate to meet the needs of the number of children receiving services. Senior leaders acknowledge that increased workforce capacity, through the addition of key positions, will be necessary to achieve the vision of servicing 225,000 children, annually, by the year 2022.

Hiring and recruitment decisions are made by the executive director based on job-related criteria. The goal of senior leaders when recruiting new employees is to fill vacancies with the most qualified individuals who have the best available skills, abilities, and experiences needed to perform the work. It is the responsibility of the executive director to fill vacancies within the organization. When positions become available, the executive director will post notices regarding general information about the position and encourage qualified current employees and volunteers to apply. Interviews are arranged and conducted by the executive director with qualified internal and external applicants. Employee morale is important to senior leaders at Client A. Efforts to retain employees and volunteers are made by senior leaders through appreciation events and public recognition, via social media, of their work. Additionally, senior leaders emphasize retention of the volunteer workforce by creating alignment between volunteer assignments and their individual passions.

The paid workforce at Client A is small and senior leaders rely heavily on the volunteers to meet the capability and capacity needs of the organization. As capacity needs change, senior leaders fill gaps through the recruitment of additional volunteers. As capability needs change, senior leaders ensure that adequate training and development opportunities are available for paid staff and volunteers. An initial orientation and training are provided by senior leaders to all new employees and volunteers. Additional training and educational opportunities, both internal and external, may be provided to employees and volunteers to enhance their capabilities and job-related functions.

Senior leaders manage the workforce using a chain of command reporting structure. Volunteers are segmented into departmental groups by area of responsibility such as infant, toys, clothes, sewing and quilting, warehouse, books, and data entry. Each department has a volunteer department leader who reports directly to the executive director. The executive director establishes roles and responsibilities for each department leader in alignment with the mission of the organization. Volunteer department leaders provide departmental status updates to the group at monthly volunteer meetings with the executive director. The executive director is also responsible for the management of the director of development and the part-time staff member.

Workplace environment and workforce support. Senior leaders have developed organizational policies and procedures to ensure workplace health, safety, and accessibility for the workforce. Client A is an equal opportunity employer and senior leaders make all employment decisions without regard to race, religion, color, sex (including pregnancy, sexual orientation and gender identity), national origin, disability, age, genetic information, or any other status protected under applicable federal, state, or local laws. The following policies exist for protecting the health and safety of the workforce; procedures for inclement weather, smoking and drug-free workplace, safety and accident protocols, workplace and sexual harassment, and workplace violence prevention. Additionally, the senior leaders of Client A comply with the Americans with Disabilities Act and will provide reasonable accommodations to qualified applicants, employees, and volunteers. The warehouse facility is wheelchair accessible and a security system exists to protect the safety of warehouse volunteers and staff.

Senior leaders at Client A do not offer health benefits. Paid employees do have access to paid vacation time based on length of service to the organization, holiday pay, and the opportunity to telecommute. The executive director must approval all requests from paid staff to work from home. Policies regarding benefits and services are made available to employees in the employee handbook. Each employee receives a copy of the handbook upon hire, has continual access to the employee handbook, and signs an acknowledgement upon receipt.

Workforce engagement. A review of Client A's workforce engagement including information regarding workforce performance and engagement, learning, and development are provided in the following sections.

Workforce performance and engagement. Senior leaders acknowledge that the level of workforce engagement influences the performance of the organization and mission fulfillment. Therefore, senior leaders make every effort to communicate often and with consistency to all staff, volunteer department leaders, and volunteers. Regular communication occurs in person, via telephone, social media, and e-mail. Senior leaders encourage feedback and two-way communication from all staff and volunteers (Table 6). The entire workforce, including the BOD, is highly committed to the mission of the organization, and therefore, performs at levels that result in tremendous year-after-year growth for the organization. The primary driver of workforce engagement is mission alignment. Senior leaders believe that as the number of children who are receiving services increases each year, the more engaged the workforce is and the higher the level of mission fulfillment.

Senior leaders at Client A use the following metrics to assess workforce engagement; tenure of full-time staff as well as the number of children receiving services on an annual basis. Volunteers are intrinsically motivated and verbally report high levels of satisfaction with the organization and their work. Senior leaders give thanks to the volunteers for their performance through public recognition via social media. Participant 2 noted that senior leaders often posts photos of volunteers happily engaged while performing their respective duties on the organizational Facebook page. Participant 2 commented further that volunteers, community partners, and Facebook followers of the organization enjoy the recognition posts, often commenting, liking, and sharing the posts.

Senior leaders provide informal feedback to staff regarding performance. Policies and procedures for the administration of formal performance do evaluations exist. However, the executive director indicated that the inconsistency with administration of formal performance evaluations at the senior leader level is primarily because of the small size of the leadership team and the infancy of the director of development position. The executive director does provide ongoing feedback, in person, to the staff and volunteer department leaders reporting to her. The executive director provides feedback in the following areas: quality of job performance, attendance, dependability, attitude, cooperation, compliance with employment policies, and year-over-year improvement in job performance. High performance is acknowledged by senior leaders through the feedback process and if deemed appropriate, will award the staff member an annual merit increase.

Learning and development. Senior leaders at Client A support the learning and development of staff and volunteers. Training and development for paid staff may occur internally or externally. Senior leaders select training opportunities that will directly support and enhance the capabilities of the individual as related to their job roles and responsibilities. Senior leaders have attended outside seminars and workshops on nonprofit taxation procedures and grant writing. Internally, the executive director conducts training and development for volunteer departmental leaders. The volunteer department leaders are responsible for their respective areas and will conduct training for their assigned volunteers. All volunteers will receive the same training within their respective departments to promote consistency in operational procedures and to further support the mission. Topics of the training for volunteers and volunteer departmental leaders relate to the organizational policies and procedures as well as those topics supporting job functions. Ongoing mentorship and coaching are areas of opportunity at Client A. Additionally, formal evaluation of the effectiveness of the learning and development system at Client A is an area of opportunity.

Formalized succession plans do not exist for paid staff or volunteer leader positions. Senior leaders, along with the BOD, recognize the need to prioritize succession planning given the aging volunteer base and the lean operational infrastructure. Senior leaders also consider future positions for the organization as opportunities for succession. Formalized succession planning is on the agenda for the fall 2019 strategic planning meeting.

Operations

Work processes. A review of Client A's work processes including information regarding key products and processes, work process management and improvement, and supply chain management and innovation are provided in the following sections.

Key products and processes. Senior leaders determine essential products and work processes with the organizational mission in mind. All products and processes of Client A must support the mission of providing critical support to youth by empowering families through seasonal and year-round programs. Partnering agencies provide input to senior leaders regarding the products necessary to meet the most vital of needs. Senior leaders respond by developing and operating programs that allow children to receive tailored support services based on their individual needs. Senior leaders seek only the products that are most requested by partnering agencies to meet the needs of the children. Additionally, senior leaders first seek donations in-kind and will only purchase products if necessary, at a reduced cost.

The key work processes at Client A include intake of needs requests through the referral system, fulfillment, and distribution. The daily operational activities are specifically designed to support the key work processes needed to achieve the mission of the organization. Senior leaders communicate regularly with one another, the workforce, and partnering agencies via the methods listed in Table 6 to ensure the daily operations are meeting the process requirements of effectiveness and efficiency to fulfill the mission. Referrals are received by senior leaders through a variety of communication methods from partnering agencies. Figure 2 depicts the key work processes including intake, fulfillment, and distribution. Referrals are received daily while product fulfillment and distribution occurs weekly. Because senior leaders and the workforce at Client A are mission driven, fulfillment and distribution may take place immediately if an urgent need arises. Senior leaders evaluate and determine the necessary support services by considering the volume required to meet the indicated need of the children.

Figure 2. Client A's product distribution process.

Work process management and improvement. Senior leaders assess work processes on an annual basis to ensure that all children in need receive support effectively and efficiently through the services provided by the leaders at Client A. Leaders at partnering agencies complete impact surveys to provide valuable feedback to senior leaders at Client A about the products and the impact on children receiving the services. Senior leaders consider the vision and mission when determining opportunities for improvement in work processes. The vision of servicing 225,000 children, annually, by the year 2022 will require senior leaders to implement work process improvements. The implementation of an inventory management system will allow senior leaders to obtain and track valuable data useful for evaluating work processes, determining areas for improvement, and procuring additional funding through grant opportunities.

Supply chain management and innovation. All members of the workforce including senior leaders have a role in the management of the supply chain within the organization. Senior leaders are responsible for obtaining the necessary in-kind products to achieve the mission of the organization. Additionally, senior leaders build and develop long-term relationships with product donors that provide relevant products that will meet the most critical needs of the children. Volunteer department leaders and volunteers are responsible for receiving referrals, fulfilling requests, and arranging delivery of services. Senior leaders provide oversight of the daily work processes and assists when needed. Senior leaders manage opportunities for innovation through the annual assessment of products and services. Results from impact surveys as well as other communication methods provide information that senior leaders use to determine if new products and services are necessary to meet the needs of the children (Table 6). Senior leaders strive to meet the most critical needs of the children, individually, while providing products that children desire. All products and services offered by the leaders of Client A are tailored to the individual child and provided at no cost, an innovative concept not offered by other youth enrichment nonprofits in Southern California.

Operational effectiveness. A review of Client A’s operational effectiveness including information regarding cost efficiencies, information systems and security, and safety and emergency protocols are provided in the following sections.

Cost efficiencies. The executive director prepares an annual budget that is subject to the review and approval of the BOD. Once approved, senior leaders use the budget as a guiding document for decisions regarding expenditures. The executive director must give approval on all purchases. Senior leaders first attempt to secure free goods through product partners. However, if a purchase is necessary, senior leaders are mindful of the cost and will only consider the purchase if there is money allotted in the budget. Any unbudgeted expenditure or commitment that senior leaders wish to make in excess of $50,000, must have the approval of the BOD. Senior leaders must replenish the cash reserves immediately. Expenses for human resources are kept to a minimum and benefits are not available for paid staff.

Processes exist to ensure that senior leaders are good stewards of resources. Senior leaders control costs through inventory management, using a first in first out approach to product distribution. At Client A, senior leaders are mindful of resources to ensure that all product is used effectively resulting in zero waste. All product is distributed to children in need or if unusable, senior leaders donate the product to partnering nonprofit agencies in need.

Information systems and security. Senior leaders select information systems for Client A using reliability and security as their criteria. The only information system used by senior leaders at Client A is a customer relationship management platform for tracking donor relations, fundraising, and marketing communications. Senior leaders are considering adding volunteer and inventory management software systems to assist in efficiency and the effectiveness of organizational procedures.

Security and cybersecurity of data and sensitive information is highly important to senior leaders. Hard copies of information such as donations and personal information are not kept on site in the administrative offices. Senior leaders rely on cloud-based systems for data storage. Because the staff at Client A is small and employees often work from home, cloud-based systems are ideal for achieving efficiency in work processes as well as maintaining the security of vital information. Senior leaders increased the internet data in 2017 to support operations. The administrative offices have an alarm system as well as locks on all doors and windows to increase safety. There is a safe in the finance office that staff can use to store vital information if needed.

Safety and emergency protocols. Senior leaders and the workforce have access to a safe operating environment to perform their job functions. All windows and doors always remain locked, and a security system enabled. Senior leaders took action to increase security and reduce the risk of theft at the warehouse and administrative offices, adding an electronic iron fence around the perimeter of the property. A secondary wall surrounds the product warehouse for added security. Senior leaders have policies and procedures in place for inclement weather and natural disasters as well as safety and accidents. Per Client A's 2018 employee handbook, senior leaders expect staff and volunteers to take an active role in maintaining a hazard-free and safe working environment.

When severe weather develops, the executive director may decide to delay the opening of the office, close operations until conditions improve, or direct employees to work from home. In the event of a government-declared state of emergency or natural disaster, the executive director closes the offices. Regarding the delivery of services, senior leaders do not provide services during a natural disaster because the focus must remain on the mission, providing critical support to children in need.

Measurement, Analysis, and Knowledge Management

Measurement, analysis, and improvement of organizational performance. A review of Client A's organizational performance including information regarding performance measurement, analysis, and improvement are provided in the following sections.

Performance measurement and analysis. Senior leaders review data gathered from organizational surveys to measure the performance of the organization. Senior leaders administer impact surveys and product service satisfaction surveys to leaders from partnering school districts, local agencies, and families annually. In addition to the data gathered from internal and external surveys, senior leaders also document the following metrics to measure organizational performance: acts of service, product sources, and inbound and outbound inventory. Data is tracked manually by senior leaders or volunteer department leaders. Senior leaders are considering the addition of an inventory management system and other electronic tracking mechanisms for data organization and tracking. The addition of systems would benefit the organization by providing senior leaders, volunteer department leaders, and staff with usable data to increase efficiencies and capabilities.

The senior leaders of Client A do use comparative data that is youth-based to set the strategic direction of the organization. Senior leaders at Client A obtain the necessary resources to provide goods and services to impoverished children free of charge compared to other youth enrichment service organizations in the local area where services and products come at a cost. Sources used for comparative data by senior leaders include kidsdata.org, a website providing information on the health and well-being of children in the state of California, as well as data provided by the local school districts regarding demographics of the children receiving services. Senior leaders use this data to ensure that they are fulfilling the mission as well as to make decisions regarding products and services as well as potential market segments for expansion.

Senior leaders evaluate organizational performance continually by reviewing tracked objectives and comparing actuals to goals. As organizational changes occur, senior leaders evaluate performance before implementing lasting change. Senior leaders piloted and then monitored a monthly outreach program for 5 years before the BOD adopted and rebranded the year-round services program permanently, now known as YES! As rapid changes occur in the external environment, senior leaders are responsive, yet conservative in establishing permanent changes. As good stewards of resources, senior leaders ensure that capabilities and capacity are in place before implementing lasting change in workforce processes and products.

Performance improvement. Senior leaders acknowledge that the vision of the future of the organization is very different than the past. A change in the vision of the organization with the addition of year-round services has resulted in exponential growth in the number of children receiving services annually. As the need for year-round services and the visibility of the organization increases, senior leaders expect to grow as they work towards achieving the vision continuously. Senior leaders are aware that to service 225,000 children, annually, by the year 2022, they will need to expand workforce capacity and capabilities through increased partnerships, donors, market segments, and staffing. Participant 3 noted the value in securing the support of the millennial generation using social media as the vehicle of communication.

Senior leaders address capacity and capabilities through annual performance evaluations of staff. Information from performance evaluations is used by senior leaders to create action plans capitalizing on the strengths of staff as well as those areas identified as needing improvement. Senior leaders address areas of weakness by providing training internally or externally to strengthen capabilities.

Information and knowledge management. A review of Client A’s information and knowledge management including information regarding organization data, information, and knowledge management are provided in the following sections.

Organizational data and information. The quality of organizational data is important to senior leaders of Client A because they use the data in the strategic planning process. Additionally, senior leaders strive for transparency in reporting outcomes to the community and various stakeholders. Senior leaders ensure the quality and availability of the data through consistent administration and review of data collected through organizational surveys. Data is then translated into readable impact reports available to the public and partners for review. The recent addition of the customer relationship management software, Bloomerang, provides senior leaders with additional data points useful in the strategic planning process. The planned addition of volunteer and inventory management software will provide senior leaders with additional data for decision making.

Knowledge management. Organizational knowledge is built through training and development of staff and volunteers. Training and development for paid staff may occur internally or externally. Senior leaders select training opportunities that will directly support and enhance the capabilities of the individual as related to their job roles and responsibilities. The senior leaders of Client A provide an orientation as well as ongoing training to volunteers and volunteer department leaders related to their area of responsibility. Additionally, organizational knowledge is built at the board level. Board members seek to ensure the continuity of governance functions through orienting and training new board members as the need arises.

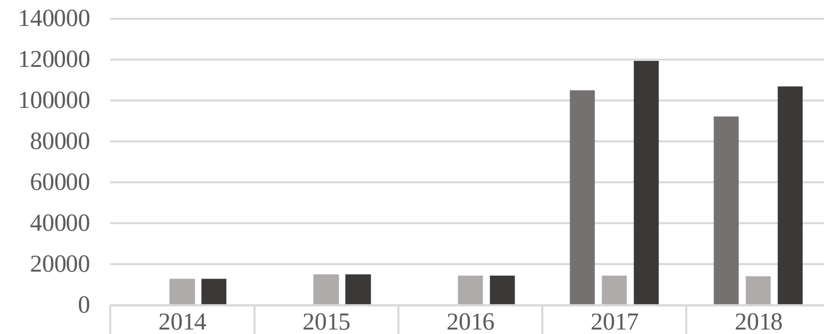
Senior leaders are mindful in sharing organizational knowledge, as appropriate, with paid staff, volunteer department leaders, volunteers, partners, and the community. Information sharing occurs in two-way exchanges via social media as well as personal interactions with staff, volunteers, partners, and the community (Table 6). Participant 2 commented that senior leaders are actively engaged on social media, often posting organizational information two to three times daily. Participants 1 and 2 noted the high level of engagement on the behalf of donors and community members via social media with followers often commenting, liking, and sharing organizational posts daily. Participant 1 noted that every comment made by a follower will receive a response by senior leaders as a strategy to build long-term relationships with those interested in supporting the mission of the organization.

Internally through personal interactions and departmental meetings, senior leaders encourage staff and volunteers to present ideas that may increase organizational capacity and capability as well as share best practices. Senior leaders are open to innovative ideas and new business practices that support the vision and are in alignment with the mission of the organization. Senior leaders consider all ideas for implementation if applicable. In addition to two-way exchanges of information, one-way information and knowledge sharing occur via organizational documents such as impact reports that senior leaders prepare and distribute annually.

Collection, Analysis, and Preparation of Results

Product and Process Results

Customer service processes and products. Senior leaders at Client A develop programs to address the most critical needs of impoverished youth in select Southern California counties. Senior leaders at Client A offer five subprograms under the YES! program, all designed to meet the critical needs of impoverished youth at no cost to the families. Additionally, leaders of Client A continue the 65-year tradition of distributing gifts to families through their Holiday distribution program. Senior leaders at Client A measure the performance of their customer-focused processes and products by the number of children served annually. Since the inception of the YES! program, the numbers of children served by Client A have increased exponentially (Figure 3).



	2014	2015	2016	2017	2018
YES!				105,090	92,269
Holiday distibution	12,995	15,015	14,363	14,459	14,260
Total	12,995	15,015	14,363	119,549	106,929

Figure 3. Number of children receiving services. Note: YES! data not formally tracked prior to 2017.

In addition to the number of children receiving services, senior leaders use data from the needs assessment forms to determine product and service offerings that will meet the most critical needs of the children. Leaders from partnering agencies fill out the needs assessment forms when requesting services from Client A. The information provided by leaders of partner agencies identified on the needs assessment form indicates an alignment between the needs of the children and the products and services offered by senior leaders at Client A through the current programs.

Work process effectiveness and supply-chain management. Limited capacity restricts senior leaders at Client A from measuring all aspects of work process effectiveness. Measurements for the effectiveness of the supply chain and work process include the number of in-kind donations received, waste reduction, and the timeline of referral to distribution. Volunteer department leaders receive referrals from the leaders of partner agencies such as local schools and nonprofit organizations. Volunteers fulfill the request for items in the warehouse and arrange delivery to transport the product from the warehouse to the referring agency. Senior leaders achieve a quick turnaround with the timeline of referral to distribution taking less than 7 days to complete, or in some cases, immediately.

Senior leaders use a first in first out approach to product distribution at Client A to assist in controlling costs, reduce waste, and adequately process the 300 truckloads of annual product donations from over a dozen product partners. Senior leaders leverage partner relationships, acquiring in-kind donations of nearly $1.5 million annually to support the operations of Client A. Senior leaders have achieved zero waste by donating all remaining product to partner agencies in need from 2016-2018. A key strategic objective of senior leaders is to implement a complete inventory control system through the addition of inventory management software and paid staffing for the warehouse. Improved inventory management with dedicated resources will enable senior leaders at Client A to exceed the vision of serving 225,000, annually, by the year 2022. Senior leaders are aware that additional partnerships are necessary to achieve the vision of the organization. Although a formal process for evaluating partners does not exist, senior leaders ensure that the values of prospective partner organizations align with the mission, vision, and values of Client A. Senior leaders are working on establishing more in-depth metrics for measuring the performance of the supply chain.

Safety and emergency preparedness. Senior leaders at Client A provide the workforce with opportunities to work from home. However, when onsite at the warehouse and administrative offices, staff and volunteers have a safe operating environment. An electronic fence secures the perimeter of the property. All offices, as well as the warehouse, are secured with locks on the doors and windows. Maps are available at each entrance on the property showing evacuation routes in the event of an emergency.

Policies and procedures regarding the health, wellness, and safety of employees are in Client A’s 2018 employee handbook. All members of the Client A team, whether volunteer or paid staff, have a responsibility to maintain a hazard-free and safe working environment. Table 8 depicts a positive three-year with zero incidents related to safety at Client A. Senior leaders retain copies of the signed staff and volunteer handbook acknowledgments. In the event of an emergency such as a natural disaster, the executive director uses a master staff and volunteer list to initiate notification calls if necessary.

Table 8

Safety and Emergency Preparedness

Incident type	Success measure	Year		
		2016	2017	2018
Accidents	# of incidents	0	0	0
Drug abuse	# of incidents	0	0	0
Workplace harassment	# of incidents	0	0	0
Workplace violence	# of incidents	0	0	0

Customer Results

Customer satisfaction. Limited results are available indicating the levels of satisfaction and engagement of customers for Client A due to restricted interactions with the end customers, the children and their families. The sole opportunity for measuring customer satisfaction is through the Holiday Distribution program because this is the only program offered by senior leaders that involves direct contact with Client A's end customer. At the event, parents of the children receive a Likert-scale survey where they may indicate their level of satisfaction with the products and services received. Although senior leaders review the results of the surveys following the event, they do not generate formalized reports of the results. Senior leaders indicate that the level of satisfaction is high. Recommendations and reviews from community members and customers on the Facebook and GuideStar pages of Client A indicate an elevated level of satisfaction with the organization. The Facebook page of Client A displays a rating of 4.8 out of 5.0 based on 44 reviews from the public. This feedback is consistent with the reports from senior leaders.

Customer engagement. Because of the sensitive nature of the primary customer group, impoverished children, senior leaders do not address the levels of customer engagement from the perspective of their end-users, the children and their families. Instead, senior leaders shift their focus on engagement to their partner agencies. Senior leaders use social media daily to engage and manage relationships with their partners and community members. A review of Client A's Facebook page showed consistent and daily posts from senior leaders as well as two-way communication in the form of responses to followers' comments. Participants 1 and 2 noted that leaders post messages of reciprocity, thanking donors and partners for their contributions as an example of a strategy that they use to engage partners and build communal relationships. Although senior leaders are not formally tracking donors via social media, Participant 1 commented further that this strategy has resulted in additional support from partners because of public recognition. Senior leaders do not use analytics provided by Facebook, strategically, to enhance customer engagement. All Participants acknowledged the need to enhance their social media use, including increasing use through additional platforms and the collection and use of social media-specific data. The recent addition of the customer relationship management tool, Bloomerang, is an initial step on behalf of senior leaders to implement a tracking mechanism for donors via social media.

Workforce Results

Capacity and capability. The workforce of Client A is vital to the health of the organization and mission fulfillment. Before 2012, the BOD operated the organization solely with a volunteer workforce. The board president acknowledged the need to increase capacity when the vision of the organization transformed to include year-round services. In 2012, the BOD hired a full-time executive director, and in 2017, the executive director added a full-time director of development to the paid staff (Figure 4). Additional paid staffing includes a part-time executive assistant. As good stewards of resources, senior leaders keep administrative costs to a minimum (Figure 5). Senior leaders add organizational capacity by recruiting a dedicated volunteer workforce consisting of 125 regular volunteers (Figure 4). The workforce also includes additional volunteers that serve in a singular capacity through third-party vendors, companies, or groups.

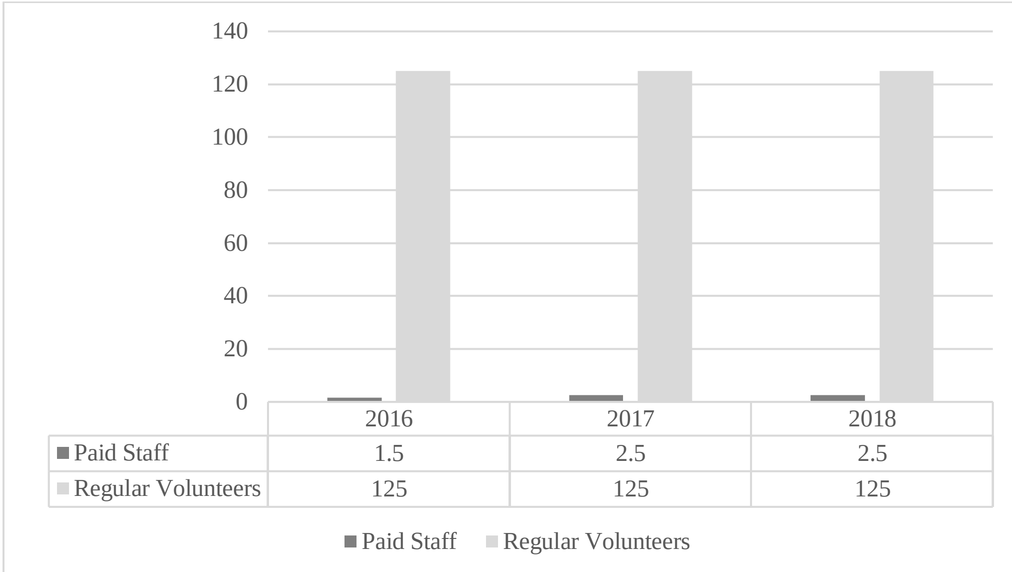


Figure 4. Client A workforce capacity.

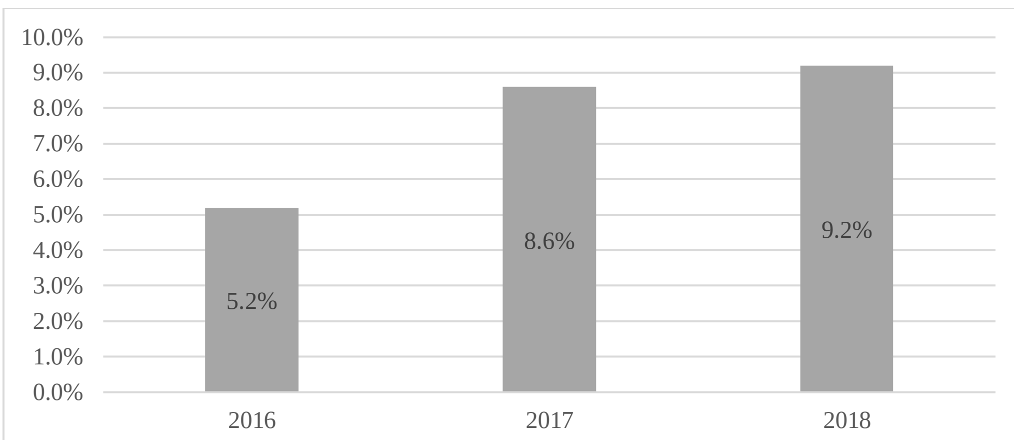


Figure 5. Ratio of salaries compared to total income.

Senior leaders recognize that additional paid staff and volunteers are necessary to increase organizational capacity further and achieve the vision of serving 225,000 children, annually, by the year 2022. Planned additions to paid staffing include a warehouse manager and volunteer manager. The addition of a volunteer manager and volunteer management software will assist senior leaders in the tracking of the volunteer workforce and additional metrics to measure the workforce capacity and capability. The addition of both positions is contingent upon the access to supplementary funding through prospective grant sources.

Workforce climate, engagement, and development. Senior leaders support a safe work environment through established policies and procedures regarding the health, wellness, and safety of paid staff and volunteers at Client A. Policies exist for protecting the health and safety of the workforce including a smoke and drug-free workplace, safety and accident protocols, workplace and sexual harassment, and workplace violence prevention. Table 8 depicts a positive three-year trend in the workplace environment at Client A, with zero incidents to date.

Senior leaders do not track engagement in any formal assessments. Instead, senior leaders measure workforce engagement by the number of children served (Figure 3). A positive trend in the number of children served annually aligns with the consistently high number of dedicated and engaged volunteers who are part of Client A's workforce. Reviews on GuideStar and Facebook indicate that staff and volunteers are satisfied with their experience working at Client A. Senior leaders recruit volunteers who are intrinsically motivated and whose values align with the mission of the organization. Additionally, senior leaders report no noteworthy staff or volunteer grievances to date.

Workforce development is essential to the senior leaders at Client A. While most of the training is conducted internally by senior leaders or volunteer department leaders, the annual budget for Client A does include funds allocated for workforce development. The executive director recognized the need to add a line item in the budget after hiring additional paid staffing in 2017. In 2018, senior leaders added $450 to the budget for staff development. The projected expenses for staff development for the year 2019 is $450 with an additional $2,050 allocated for conferences and meetings. Senior leaders do not include succession planning as a part of the staff development process. Formalized success plans do not exist for paid staff or volunteer department leader positions. However, with an aging volunteer base and limited paid staff, senior leaders acknowledged the need to consider succession planning adding the item to the agenda for the fall 2019 strategic planning meeting.

Leadership and Governance Results

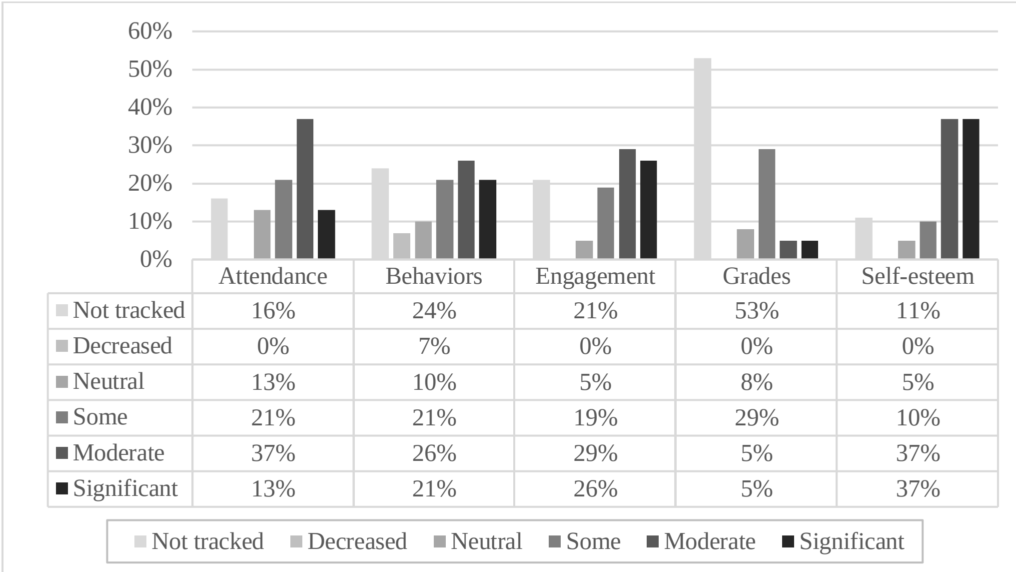
Leadership, governance, and societal responsibility. Improving transparency and accountability to partners and the community is important to the senior leaders at Client A and necessary for increasing opportunities for additional funding sources. In 2018, senior leaders along with the support of the BOD, initiated the process of external audited financials. Auditors did not indicate any significant areas requiring attention in the 2017 financials. As a fully operational and licensed nonprofit organization, Client A adheres to regulatory requirements. Senior leaders are 100% compliant with all requirements of nonprofit organizations operating under the 501(c)(3) registration. Senior leaders ensure ethical compliance through ongoing training and development of staff and volunteers as well as obtaining signature acknowledgements of Client A’s code of conduct (Table 9).

Table 9

Governance Results, Ethics, and Compliance with Laws and Regulations

Leadership function	Indicator of compliance	Year		
		2016	2017	2018
Governance				
External financial audits	# of issues	N/A	0	Pending
Laws, regulations, and accreditations				
Compliance laws and regulations for NPOs	IRS 990 forms	100%	100%	100%
Ethics				
Employee handbook	% of signed acknowledgements	100%	100%	100%
Code of conduct	% signed	100%	100%	100%

Benefitting and improving the well-being of society is inherent in the mission of Client A. Leaders measure the success of mission fulfillment and societal contribution by the number of children receiving services annually (Figure 3). Dedicated volunteers and staff respond quickly to the needs of impoverished children (Figure 2), improving economic conditions and removing socio-economic barriers for children and their families in Southern California. The timeline from referral to distribution is less than 7 days and, in some cases, less than 24 hours. Furthermore, outcomes relative to the YES! program are favorable for children receiving services from Client A. In April 2019, senior leaders distributed and received twenty-nine impact surveys from the leaders at partnering schools. The results indicate improved attendance, grades, engagement, behaviors, and self-esteem among children receiving services (Figure 6).



	Attendance	Behaviors	Engagement	Grades	Self-esteem
Not tracked	16%	24%	21%	53%	11%
Decreased	0%	7%	0%	0%	0%
Neutral	13%	10%	5%	8%	5%
Some	21%	21%	19%	29%	10%
Moderate	37%	26%	29%	5%	37%
Significant	13%	21%	26%	5%	37%

Figure 6. 2019 Impact survey results.

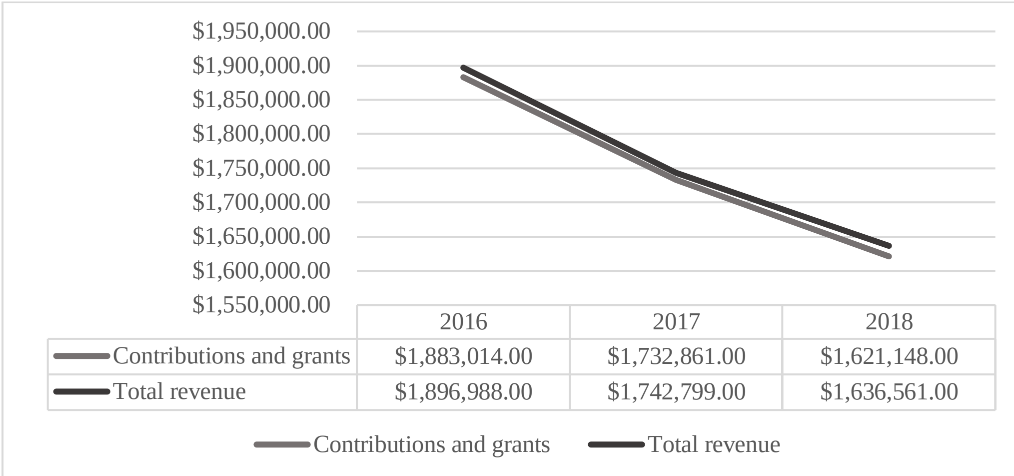
Practicing good stewardship of resources, Client A's senior leaders exercise a zero-waste policy of donated in-kind products. Senior leaders donate all unused product to partnering nonprofit agencies and their constituents. The act of giving the undistributed products to partnering nonprofits ensures the product is not disposed of improperly, therefore, creating an environmental impact.

Strategy achievement. Senior leaders, along with the BOD, set the strategic direction of Client A. All strategic objectives support the mission of the organization and the vision of providing critical support to 225,000 children, annually, by the year 2022 (Table 7). Increasing unrestricted revenue and funding from donors is critical for the sustained operations of Client A. Senior leaders, with the assistance of an external grant writer, applied for a large grant awarding unrestricted funds in the spring of 2019. Senior leaders are awaiting a positive response in the fall of 2019.

Senior leaders acknowledge the importance of donor and partner relationships to the success of the organization and mission achievement. As a strategy for building and maintaining relationships with partners and donors, senior leaders thank each donor and partner regardless of the size of donation, with a written acknowledgement. Participants 1and 2 noted that leaders post messages of reciprocity on social media, thanking donors and partners for their contributions. Although senior leaders do not track donors via social media, Participant 1 stated that using this strategy has resulted in additional support from partners because of the public recognition.

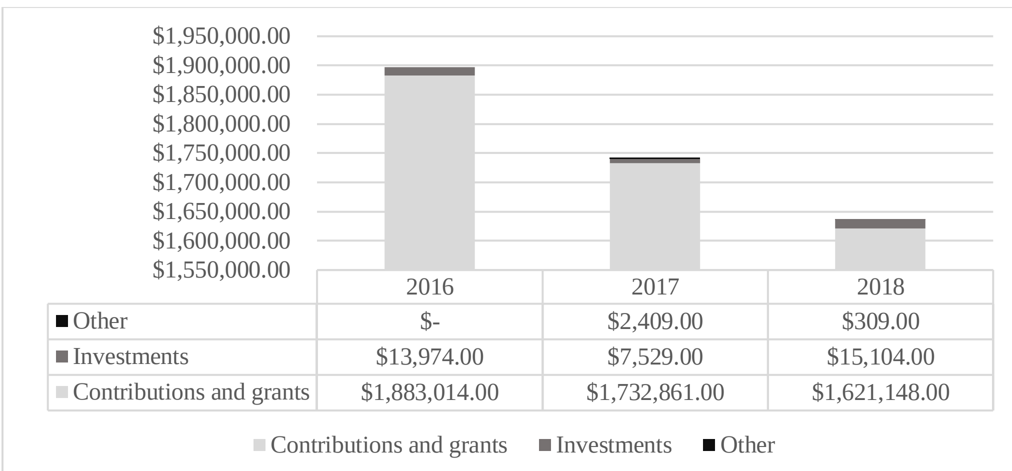
Financial and Market Results

Financial and market performance. Positive financial performance is critical to the continued mission fulfillment of Client A. Senior leaders of Client A rely solely on public support to operate the organization. Because Client A provides critical assistance to impoverished children at no cost to the family, there is no program revenue. The largest source of revenue comes from noncash sources such as goods and services donated in-kind from partner agencies and corporations (Figure 7). In addition to contributions and grants, other revenue sources include minimal income from organizational investments and various sources (Figure 8). Senior leaders acknowledge the need to diversify funds and increase cash contributions from individual donors as well as grants (Figure 9).



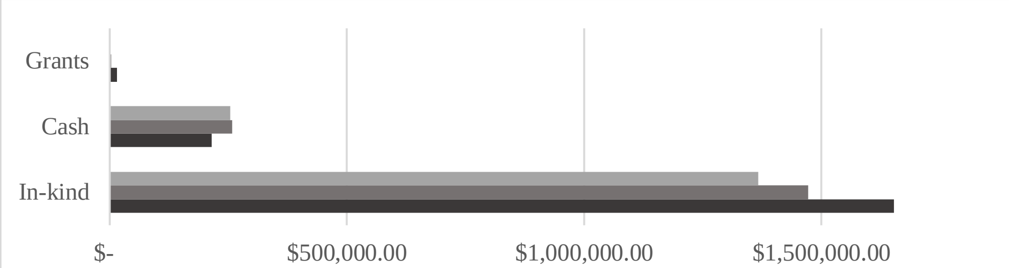
	2016	2017	2018
Contributions and grants	$1,883,014.00	$1,732,861.00	$1,621,148.00
Total revenue	$1,896,988.00	$1,742,799.00	$1,636,561.00

Figure 7. Contributions and grants compared to total revenue.



	2016	2017	2018
Other	$-	$2,409.00	$309.00
Investments	$13,974.00	$7,529.00	$15,104.00
Contributions and grants	$1,883,014.00	$1,732,861.00	$1,621,148.00

Figure 8. Revenue from contributions and grants, investments, and other sources.



	In-kind	Cash	Grants
2018	$1,367,767.00	$253,381.00	$-
2017	$1,471,982.00	$258,379.00	$2,500.00
2016	$1,653,657.00	$214,333.00	$15,000.00

Figure 9. Client A revenue diversification.

Senior leaders prepare an annual budget that is subject to the review and approval of the BOD. Once approved, senior leaders use the budget as a guiding document for decisions regarding expenditures. Purchases are kept to a minimum, however, with increased program expenses, total expenses outweighed total revenue in 2018 (Figure 10). Senior leaders consider net assets as an indicator of financial health for the organization. Despite operating at a loss in 2018, senior leaders retain positive net assets for the organization (Figure 11).

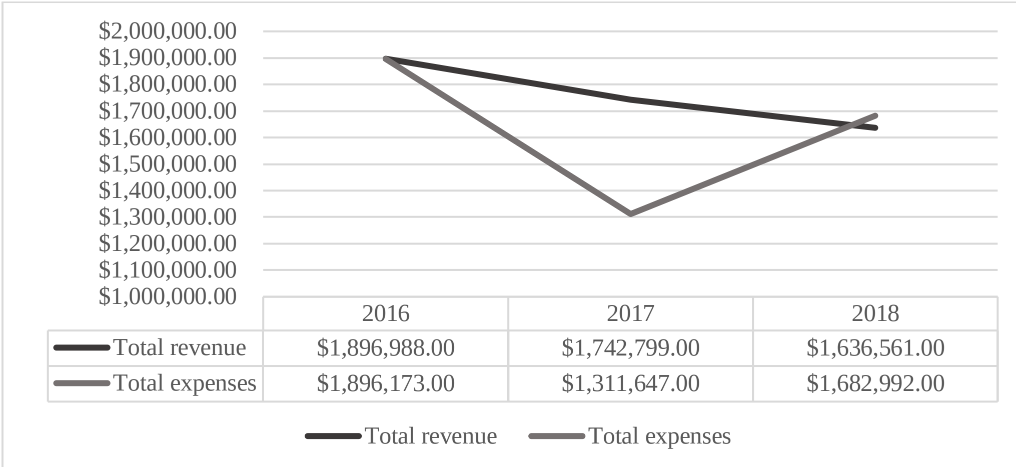


Figure 10. Client A’s total revenue compared to total expenses.

Figure 11. Client A’s net assets.

Key Themes

Process strengths. Senior leaders at Client A acknowledge that sound processes are critical to sustaining operations and reaching the strategic goal of increased distribution and children served. Every action taken, process implemented, and decision made occurs with the mission, vision, and values of Client A in mind. A highly dedicated workforce and governing board ensure integrity and dignity in every interaction with customers, partners, donors, and the community. Senior leaders have established a successful and efficient distribution process for meeting the most critical needs of children (Figure 2). Senior leaders seek input and feedback from partners regarding programs and products during the continuous cycles of process and organizational performance improvement. Additionally, senior leaders have survey processes in place to receive feedback from customers regarding satisfaction and survey results to demonstrate the effectiveness of the programs for children receiving services.

Processes for workforce training and development ensure that the volunteers and staff are equipped to meet the expectations of their roles and responsibilities and that learning occurs within the organization. An emphasis on alignment between roles and responsibilities and individual passions creates a work environment where volunteers and staff flourish and contributes to workforce retention. The skilled volunteer workforce is a strength for Client A and is necessary as senior leaders strive to fulfill the vision of servicing 225,000 children, annually, by the year 2022.

An additional process strength of Client A's senior leaders includes consistent and transparent two-way communication as well as recognition of volunteers, partners, and donors via social media (Table 6). Strong communication is significant to the senior leaders' ability to develop and establish long-term relationships that are communal in nature. Senior leaders have successfully built lasting and coveted relationships with several partners, including funding, distribution, product, local agencies, and school districts. Participants 1 and 2 confirmed that senior leaders use social media strategically to express gratitude and appreciation to volunteers, partners, and donors. All participants confirmed that senior leaders post daily and respond to each comment received on Facebook. This strategy has resulted in increased public support from the community, necessary to obtain the funds for organizational stability and mission fulfillment.

Process opportunities. The use of technology for tracking and formalizing data that senior leaders use for decision making and aiding in process improvement is an area of opportunity at Client A. Although senior leaders implemented the use of Bloomerang in 2019, a customer relationship management tool, the use of the platform is in its infancy. Participant 2 commented on the capabilities within the platform that leaders can use to leverage social media contacts, build donor and partner relationships, reporting, and data analysis. Additionally, technologies for inventory and volunteer management may be useful for senior leaders to secure data that they can use for obtaining funding, reporting the economic impact of Client A, assessing organizational performance, and making decisions regarding key work processes and products. Senior leaders at Client A embrace the need for additional technologies and organizational performance measures as indicated by their current strategic initiatives (Table 7).

Senior leaders and the BOD acknowledge the importance of succession planning. However, there is no succession plan in place for the executive director or the director of development. Furthermore, the volunteer workforce is aging, and senior leaders will need to identify future department leaders within the volunteer workforce. A formalized succession planning process is critical to the continued operations of Client A and mission fulfillment. Senior leaders have added the topic of succession planning to the agenda of the upcoming fall 2019 strategic planning meeting. An opportunity also exists to formalize administration of senior leader performance evaluations.

Results strengths. Senior leaders at Client A exhibit positive results in customer satisfaction, overall financials, partnerships, and program performance. Senior leaders continue to achieve the mission of the organization, as indicated by the number of children receiving services annually (Figure 3). Since the inception of the organization in 1952, the workforce has provided over 1.1 million impoverished children in select counties in Southern California with services and goods addressing the most critical of needs. Senior leaders added year-round services in 2012, formally adopted the year-round services program in 2017, and rebranded the program to YES! servicing over 100,000 children annually. Children receiving services are showing improvement in the areas of school attendance, self-esteem, grades, engagement, and behaviors (Figure 6). Senior leaders have acquired coveted relationships with partner organizations resulting in nearly $1.5 million in-kind product donations annually (Figure 9).

Customers of Client A are satisfied with the goods and services they are receiving. Senior leaders receive minimal complaints during the Christmas distribution event. Additionally, recommendations and reviews from community members and customers on the Facebook and GuideStar pages of Client A indicate an elevated level of satisfaction with the organization. The Facebook page of Client A displays a rating of 4.8 out of 5.0 based on 44 reviews from the public. This feedback is consistent with the reports from senior leaders.

Senior leaders demonstrate good stewardship by ensuring effective use of every resource from in-kind donations of products to keeping administrative expenses to a minimum. Volunteers effectively distribute all donated products to children in need or other nonprofit partners in need, resulting in zero waste of product year after year. Salaries increased in 2017 due to the addition of the director of development position. However, administrative expenses remain under 10% of total income year after year (Figure 5) allowing senior leaders to allocate resources to support programs and the delivery of services to children in need.

Results opportunities. Although senior leaders at Client A demonstrate various strengths in organizational results, opportunities exist for additional performance measures. Senior leaders do not track, or measure performance related to board effectiveness, donor retention, and workforce capacity. Senior leaders acknowledge the need for additional performance measurements and historical data, however, have cited capacity as an obstacle. Increasing workforce capacity is essential to achieving strategic objectives and the vision of servicing 225,000 children, annually, by the year 2022. Additionally, increasing workforce capacity will also enable senior leaders at Client A to continue to execute the mission without sacrificing the values of integrity and dignity during the delivery of service. Senior leaders are aware that improving the diversification of funding through grants and individual donations is a necessary step in increasing workforce capacity and organizational sustainability.

Project Summary

Nonprofit leaders provide a wide array of indispensable services necessary to aid in the well-being of society (Paulin et al., 2014). Nonprofit leaders rely on repeat donations and public participation for organizational success and continued mission fulfillment (Harrison, 2018). Leaders who establish positive relationships between organizations and their publics can benefit the organization through enhanced reputations and increased supportive intentions and behaviors from donors (McDonald et al., 2015; Men & Muralidharan, 2017). Paulin et al. (2014) posited that nonprofit leaders should consider innovative strategies for working closely with the most promising of potential supporters.

In this study, I evaluated strategies that Client A senior leaders use to build long-term relationships with donors through social media. Relationship management is essential to the success of the organization in the nonprofit sector. The ability to develop and nurture relationships with donors and other stakeholders is a significant aspect of nonprofit management and achieving organizational sustainability (Svensson et al., 2014). Due to the lack of repeat donations among first-time donors, leaders must focus on developing long-term relationships (Khodakarami et al., 2015; Wiggill, 2014). Understanding how to use social media as an engagement and two-way communication tool is essential for long-term relationship cultivation and maintenance.

Each participant in this study contributed valuable information regarding the strategies that Client A leaders use to develop long-term relationships with donors through social media. Additionally, participants provided information regarding all aspects of nonprofit leadership affecting organizational sustainability including strategy, customers, workforce, operations, measurement, analysis, and knowledge management. Senior leaders of nonprofit organizations who read this research may benefit from the strategies and recommendations identified in this study to build long-term relationships with donors through social media, thus increasing financial resources through a loyal donor community and enhancing organizational sustainability. Leaders of sustainable nonprofit organizations may contribute to positive social change by providing members of the community with critical services through continued mission fulfillment.

Contributions and Recommendations

Nonprofit leaders rely on public support to fulfill the mission of the organization. In an increasingly competitive landscape, senior leaders of nonprofits must have the necessary skills to manage relationships with diverse stakeholder groups to garner the needed support for organizational sustainability and mission fulfillment. In the following paragraphs, I provide opportunities and recommendations in the areas of leadership succession and performance evaluation, workforce capacity, revenue diversification, performance measurements and data collection, and the expansion of relationship management via social media.

Senior leaders at Client A foster an organizational culture among the workforce that is mission driven. The organization benefits from influential leaders who are passionate about the mission, ensuring that all decisions are mission centric. The executive director has developed and implemented programs that effectively meet the needs of the community. Building relationships with various stakeholders, ensuring continuous achievement of organizational objectives, establishing strategic priorities and processes necessary for the effective acquisition and distribution of product and services, are key strengths of the senior leaders at Client A. However, leadership continuity may be at-risk without an identified strategy for leadership succession. I recommend that the

BOD and senior leaders adhere to the agenda of the upcoming strategic planning meeting and address the opportunities for succession planning for essential leadership and volunteer positions within the organization. I recommend that senior leaders, along with the BOD, ensure the effective administration of performance evaluations for all critical positions at Client A. The administration of performance evaluations creates additional opportunities for two-way communication between staff and the senior leaders of the organization. Further, performance evaluations allow senior leaders and staff to enhance the process of performance improvement and provides the opportunity to align the strategic goals of the organization with individual performance objectives.

Client A senior leaders provide critical support to impoverished youth free of charge, and therefore, do not acquire programmatic revenue. Client A senior leaders would not be able to achieve strategic priorities and service over 100,000 children annually without the extensive network of partners and the support of the community. Senior leaders effectively build and maintain relationships with various partners and collaborators who provide shipping, delivery, and in-kind products to Client A for free or a reduced cost, therefore ensuring the most effective use of resources. To expand the mission of the organization and increase services to impoverished youth in additional counties and cities in Southern California, I recommend that senior leaders at Client A continue to seek opportunities for revenue diversification through grant applications and the acquisition of additional individual donors. The diversification of revenue is critical for organizational sustainability and continued mission fulfillment.

Client A leaders execute effective two-way communication strategies via social media to assist in building long-term relationships with donors and stakeholders. However, as dependence on stakeholder contributions increase for nonprofit organizations, so does the need for additional stakeholder engagement (Clark et al., 2016). I recommend that leaders leverage their existing communication strategy by expanding their use of social media to additional platforms to further enhance communication and engagement with stakeholders. Expanding Client A’s communication network with stakeholders via additional social media platforms may assist in the acquisition of additional financial and volunteer resources, create other opportunities for two-way communication necessary for building awareness and receiving valuable stakeholder feedback, and increase organizational transparency. Additionally, the use of social media metrics and data will be beneficial to senior leaders in continuously evaluating the performance of social media efforts. The execution of these recommendations will likely require the addition of a dedicated staff member or volunteer leader whose primary focus is the development and implementation of a robust social media communications strategy.

In smaller nonprofits, employees fulfill multiple roles to meet the operational needs of the organization (Biga et al., 2015). Senior leaders operate Client A with a lean infrastructure and rely heavily on a committed volunteer workforce to meet strategic priorities and fulfill the mission of the organization. Senior leaders, along with the BOD, revised the vision to expand upon the mission by servicing 225,000 children, annually, by the year 2022. Senior leaders have established specific strategic objectives and the associated action plans necessary to achieve the vision in the strategic plan for the organization. An increase in workforce capacity is essential to achieve the vision of Client A senior leaders. I recommend that senior leaders invest in the recruitment and development of leaders in the areas of volunteer and warehouse management. Senior leaders can effectively increase workforce capacity and capabilities by establishing performance objectives within these critical areas. Furthermore, added technologies in the areas of volunteer and warehouse management might be beneficial for data collection, performance improvement, and increased accountability.

Nonprofit leaders reading this research may benefit from the strategies and recommendations ascertained to build long-term relationships with donors through social media, thus increasing financial resources through a loyal donor community and enhancing organizational sustainability. I recommend future researchers explore how nonprofit leaders use social media to build long-term relationships with donors using alternative conceptual frameworks such as relationship management theory or social media theory. Viewing the subject through varying lenses may provide alternative perspectives valuable to leaders of nonprofit organizations. I recommend researchers consider conducting a multiple case study. Conducting a case study with various nonprofit organizations may present further data and information on how leaders of nonprofit organizations use social media to build long-term relationships with donors.

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Appendix A: Interview Protocol

Interview Protocol

1. Begin interview protocol.
2. I will greet participant, introduce myself, and explain my role as the researcher.
3. I will thank the participant for their participation in study.
4. I will explain topic of study including central research question.
5. I will confirm that the participant has read and acknowledged the consent form.
6. I will provide information to the participant on how to withdraw from the study.
7. I will explain member checking process and confirm timelines for participant to review data ensuring validity and reliability.
8. I will confirm participant's permission to record the interview and advise participant that I will also be hand recording interview information.
9. I will begin the interview.
10. I will ask the predetermined interview questions and any follow-up questions.
11. I will end the interview and thank participant.
12. I will explain to the participant when they can expect to receive the data to review.
13. I will confirm that the participant has my contact information should they have any questions or concerns.
14. End interview protocol.

Appendix B: Interview Questions

Interview Questions

1. What strategies do you use to build long-term relationships with donors through social media?
2. How would you describe the organization's social media interactions with its participants?
3. What are your key performance metrics for evaluating the effectiveness of your strategies to build long-term donor relationships through social media?
4. What tracking mechanisms do you use to monitor the content and frequency of social media communications with donors?
5. How do you engage with those who you identify as regular participants on social media, those who comment or like a post?
6. How, if at all, does the organization recognize repeat donors or other supporters of the organization? If any, what response did the organization receive because of that recognition?
7. What more do you wish to say about how you build long-term relationships with donors through social media?