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Nonprofit Leader External Communication Strategies to Attract New Donors

Laurie Ann Albarino
Walden University

Walden University

College of Management and Technology

This is to certify that the doctoral study by

Laurie Ann Albarino

has been found to be complete and satisfactory in all respects,
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Review Committee
Dr. Brandon Simmons, Committee Chairperson, Doctor of Business Administration Faculty

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

Dr. Denise Land, University Reviewer, Doctor of Business Administration Faculty

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

Walden University
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Abstract

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Consulting Capstone Study Submitted in Partial Fulfillment

of the Requirements for the Degree of

Doctor of Business Administration

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Abstract

Approximately 64% of nonprofit leaders struggle to connect with supporters through fund initiatives alone, and 59% of nonprofit leaders lack the marketing communication capability to attract new donors. Fundraising is vital to nonprofit organizations' sustainability and essential for successfully attracting new donors. The purpose of this qualitative single case study was to explore effective external communication strategies used by 3 southern California nonprofits through the conceptual lens of the integrated marketing communications theory. Data were gathered using semistructured interviews, a review of organizational documents and online databases, and the Baldrige Excellence Framework. The data were analyzed using Yin's 5-step process. The two key themes that emerged were process strengths and process opportunities. The results of this study could contribute to positive social change by helping organizations strengthen external communications strategies to increase new donors and financial capital to achieve mission goals.

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Dedication

I dedicate this study to my daughter, Devon, for her unwavering support and encouragement throughout the research process. Devon, you are my inspiration and a constant reminder of why it is important to strive for and realize my goals. I also dedicate this study to my family, who inspired and motivated me early in my life and gave me the confidence and drive to achieve my ambitions. My sincere appreciation goes to my colleagues for their understanding and encouragement throughout this journey. Finally, I wish to thank my friends, who, in one way or another, contributed to this process by keeping my spirits up and driving me to the finish line.

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Section 1: Foundation of the Study

In an environment in which sustainability is threatened for nonprofit and for-profit competitors alike, leaders of nonprofit organizations are seeking effective external communication strategies to attract new donors (Llopis-Amorós, Gil-Saura, & Ruiz Molina, 2018). While past researchers conducted studies on employed business communication and marketing strategies, limited research exists on nonprofit external communication strategies (Llopis-Amorós et al., 2018). When combined with limited resources, the lack of external communication strategies has decreased the financial capacity of nonprofits (Kotler, 1979). Improved communication with current and potential donors can increase revenue and assure sustainability (Charles & Kim, 2016). Marketing communications are a vital component of increasing sales (Laurie & Mortimer, 2019). Anantachart and Chaihanchanchai (2017) posited that nonprofit organizations do not have the skills or abilities to effectively implement communication tools in their marketing approach. Therefore, in this qualitative single case study, I explored nonprofit leaders' effective external communication strategies to attract new donors.

Background of the Problem

Raising funds needed for long-term survival is difficult for some nonprofit organizations. According to Haleem, Khalid, Khan, Michael, and Saqib (2017), the financial stability of charitable organizations relies on donations from private individuals or government funding. Since 2009, nonprofit organizations have been confronted with the challenges of an overcrowded marketplace from within the industry and for-profit firms adopting corporate social responsibility (CSR) strategies that give donors more ways to contribute to social causes, which increases the competition for new donor support and offerings (Grasse, Whaley, & Ihrke, 2016). Using limited resources, nonprofit leaders must find unique ways to capture donors' attention and loyalty as well as influence a donor's intentions. Some nonprofit leaders are unable to obtain the donations necessary to meet mission goals because of the lack of indirect funding and resources to support effective advertising and communication strategies (Hommerová & Severová, 2019).

According to Khodakarami, Petersen, and Venkatesan (2015), between 1999 and 2009, the number of public charities grew 54%; however, charitable giving did not increase. Charitable giving is what enables nonprofit organizations to fulfill their missions; therefore, attracting donor support is a vital issue for nonprofit organizations (Lin & Wang, 2016; Northrop, 2018). Billett, Chen, Martin, Roychowdhury, and Wang (2018) claimed external communication is necessary for increasing organization value; consequently, nonprofit organization leaders should aim to reach the various donor types using diverse external communication methods and platforms. Nonprofit leaders must seek new ways to effectively communicate with all stakeholders and customer groups to improve current relationships and use external communications to effectively attract and influence new donor backing.

Problem Statement

During the 2008–2009 financial crisis, 40% of nonprofit leaders did not meet the financial capacity needed to achieve mission goals (Lin & Wang, 2016). Approximately

64% of nonprofit leaders struggle to connect with supporters through fund initiatives alone, and 59% of nonprofit leaders lack the marketing communication capability to attract new donors (Leipnitz & Sundermann, 2019). The general business problem was that some leaders do not effectively use external communications to attract new donors. The specific business problem was that some nonprofit senior leaders (SLs) lack effective external communication strategies to attract new donors.

Purpose Statement

The purpose of this qualitative single case study was to explore effective external communication strategies used by nonprofit SLs to attract new donors. The targeted population consisted of SLs from a nonprofit research organization located in southern California. The SLs chosen as the population in this study had over 20 years of experience in a successful nonprofit organization, were key planners and decision-makers responsible for developing effective organizational strategies, and had a proven record growing new donor contributions. The results from this study have the potential to promote positive social change by increasing funding, which could expand the discovery of innovative treatments and cures to improve the lives of families and children affected by pediatric cancer.

Nature of the Study

Researchers commonly use qualitative, quantitative, and mixed methods research methodologies for their studies (Saunders, Lewis, & Thornhill, 2015). I used a qualitative method in this study. Taguchi (2018) posited that qualitative researchers seek to investigate a phenomenon and interpret, describe, and analyze the problem in a real-life context. The quantitative research method is used to test a theory using data to examine relationships and group differences among variables using statistical procedures (Park & Park, 2016). Additionally, the mixed methods approach is employed to explore and examine phenomena to provide researchers a deeper theoretical understanding by integrating both qualitative and quantitative methods (Saunders et al., 2015). The quantitative research method and mixed methods approaches were not optimal choices for exploring external communication strategies used because this was an exploratory study.

Researchers typically use case study, miniethnographic, or phenomenological qualitative research designs as a framework for data collection and analysis (Saunders et al., 2015). According to Yin (2018), researchers use a case study design to develop a detailed description of a problem using multiple data collection techniques to gather information and ensure the reliability of the study. I conducted this study using a qualitative, single case study approach to perform an in-depth inquiry within a real-life context. Researchers use a miniethnographic design to observe and understand a community's culture and lifeways and, therefore, was not fitting for this exploratory study because the culture of a community was not the focus (see Andersson, Borjesson, Ehrnberger, Gunn, & Isaksson, 2017). Researchers use a phenomenological research design to explore a phenomenon through peoples' individual experiences of an event (Dodgson, 2017; Saunders et al., 2015). Therefore, the phenomenological research design was not suitable for this study because the aim of this study was to obtain a comprehensive understanding of the research problem.

Research Question

What effective external communication strategies did nonprofit senior leaders use to attract new donors?

Interview Questions

1. What external communication strategies do you use to attract new donors?
2. How did you implement these external communication strategies?
3. How do you measure the success of your external communication strategies?
4. What external communication strategies worked most effectively?
5. What were the key barriers you faced related to implementing your strategies for attracting new donors?
6. How did you address the key barriers to implementing your strategies for attracting new donors?
7. What additional information can you provide regarding the external communication strategies you use to increase new donor acquisition rates?

Conceptual Framework

The integrated marketing communication (IMC) theory was the conceptual framework for this study. The IMC was first introduced in the United States at the Medill School of Journalism at Northwestern University in the late 1980s and was later defined in a study by Caywood, Schultz, and Wang (1991) in coordination with the American Advertising Agencies Association (4As) as the creation of clarity, consistency, and maximum communication impact through the use mix of marketing communication tools (Anantachart & Chaihanchanchai, 2017; Kitchen & Schultz, 1997). Researchers see the

IMC framework as a planning process that business leaders can use to connect with and influence a targeted audience (Anantachart & Chaihanchanchai, 2017). Anantachart and Chaihanchanchai (2017) described IMC as a brand communications program that manages stakeholders, content, and communication methods. IMC principles require business leaders to assess the roles of the various communication programs within an organization, such as public relations, sales, and advertising, to discover ways to integrate and streamline communications to improve efficiency and reduce marketing costs (Kitchen & Schultz, 1997). According to Duralia (2018), the key components of IMC planning include the following:

- Use of the hierarchy of marketing communication effects: The basis of an organization's activities and messaging, such as positioning, personality, and proposition.
- Communication: Identify the principles needed to optimize communication and the impacts on the audience.
- Marketing communication components: Determine communication objectives, identify a target audience, and design messages.
- Implementation: Selection of personal communication and nonpersonal communication channels.
- Gather feedback: Survey the target audience regarding the effectiveness of the messaging.

The nonprofit market is growing; thus, nonprofit organizations depending on individual donations for business sustainability, must find ways to keep current donors engaged and attract new donors. Quach and Thaichon (2016) posited that IMC is a valuable way for firms to capture and influence new and old customers to choose their brand over a competitor's brand. Billett et al. (2018) claimed IMC is a holistic communications planning approach that demonstrates how the relationship between organizational messaging, social cultures, external stimuli, and communication channels favorably influence consumers' buying behavior. The IMC conceptual framework was a suitable fit for this study because it provided an effective framework for developing external communication strategies for nonprofit leaders. The IMC's purpose is to be used to identify and understand the successful methods for communicating and building relationships with potential customers and stakeholders (Keller, 2016).

Operational Definitions

Brand: A firm's unique identity consisting of a logo, messaging, and packaging that makes an organization recognizable to customers (Terech, 2018).

External communication strategies: Ways in which organizations use adequate, consistent, and coordinated messaging to reach all stakeholders and donors (Billett et al., 2018).

Nonprofit: A nonprofit organization is established to serve the public to improve the lives of individuals and communities, nationally or globally, and is dependent on charitable donations for sustainability (Lin & Wang, 2016). An organization that is established and operated according to 501(c)(3) exempt requirements with none of its earnings going to private shareholders or individuals or to influence legislation (Internal Revenue Service [IRS], 2019).

Philanthropy: This is where a mutually beneficial initiative where individuals or business owners donate to charities in exchange for some personal or business benefit (Sauerwald & Su, 2018).

Assumptions, Limitations, and Delimitations

Assumptions

Researchers make assumptions when something is believed to be accurate but lacks adequate evidence to support a claim (Armstrong & Kepler, 2018). Assumptions are necessary for drawing causal inferences that restrict potential outcomes (Armstrong & Kepler, 2018; Marshall & Rossman, 2016). The assumptions made in this qualitative single case study were:

- External communications strategies are necessary for nonprofit leaders to attract new donors.
- New donor support would give the financial stability needed for nonprofit leaders to reach their goals.
- The participant case organization would provide access to all documents, electronic media, and supporting information.
- The participants would give detailed, forthright, and transparent responses to the interview questions.

Limitations

Limitations point out the weaknesses of a study and reveal characteristics that may affect or influence the results of the research by being outside the researcher's control (Yin, 2018). The limitations of this study include the following:

- The focus of the study was on the nonprofit industry in southern California, potentially limiting the results geographically.
- Only nonprofit leaders and board members were the participants in this qualitative single case study, limiting the study in method and design as well as in the number of participants.

Delimitations

Delimitations are the researcher's choices that describe the scope of a study and explain the boundaries of a study (Yin, 2018). The delimitations of this study include the following:

- In this study, I used the Baldrige Excellence Framework criteria to develop the interview questions to explore nonprofit organizational performance, which does not include other interviewing frameworks.
- I focused on external communication strategies, potentially excluding other forms of gathering information.
- Only nonprofit SLs and board members were included as participants, possibly excluding the views of others within the industry.

Significance of the Study

Contribution to Business Practice

Souder (2016) argued that fundraising is vital to a nonprofit organization's mission and success; therefore, external communications are essential for survival. The findings of this study may be valuable to current and future nonprofit leaders by creating awareness of effective external communication strategies used by other successful nonprofit leaders that influence and gain new donor support. Henley (2001) suggested the most important factor for an effective nonprofit communication plan is the strategy. The leaders of nonprofit organizations might use the outcomes of this study to decide to use, adapt, or invest potentially limited resources in planning, developing, and executing external communication strategies. Additionally, nonprofit leaders could discover cost savings and efficiencies in marketing resources and lower costs by using the concepts highlighted in this study. The results of my research may provide nonprofit leaders with enough information to evaluate their messaging strategies and to construct a relevant message that may compel more individuals and corporate donors to contribute to the leaders' organizations.

Implications for Social Change

The social change implications of this study include the possibility that nonprofit leaders use the external communication strategies noted in this study to develop external communications to reach new and inspire donors, stimulating financial growth to enable service to a broader community. Leaders may use the concepts identified in this study to heighten communication effects and increase exposure to a more extensive research community for the enhanced discovery of innovative treatments and cures to improve the lives of families and children affected by pediatric cancer. The findings of this study might result in catalyzing nonprofit leaders to use communication channels that promote active dialogue among the organization, donors, and stakeholders to increase the funding amount of research grants offered to advance the fight against pediatric cancer and improve the quality of life for the communities they serve.

A Review of the Professional and Academic Literature

The purpose of this qualitative single case study was to explore effective external communication strategies used by nonprofit leaders to attract new donors. In the review of the literature, I focused on strategies supporting marketing communications to influence donor behavior. I conducted a comprehensive and thorough review of peer-reviewed journal articles, seminal books, and government publications. In the search process, Walden University Library database sources were accessed, including Emerald Management Journals, GuideStar, Science Direct, ProQuest, and Scholar Works, as well as the Google Scholar search engines. In addition, the central keywords and phrases used for this research were as follows: *integrated marketing communications*, *external communication, marketing communication, nonprofit marketing communications,* and *brand advocacy*. To comply with the Doctor of Business Administration rule that 85% of academic sources used in the study must be published within the past 5 years, of the 159 sources referenced, 151 published (i.e., 95% of the sources cited) within the years of 2015–2019. A total of seven published articles and one published book before 2015. There were eight books cited and two government publications. Table 1 shows the source information used for this study.

Table 1

Source Information

Literature review content	Total #	Within 5-year range (2015–2019)	% Peer-reviewed within 5-year range (2015–2019)
Seminal books	8	7	87%
Peer-reviewed articles	149	142	95%
Government Publications	2	2	100%
Total	159	151	95%

In this review, I provide an overview of external communications. Then, I describe the IMC theory as the conceptual framework of the study, including general information concerning the benefits of exploring IMC. Following the exploration of the IMC theory, external communications are addressed in relation to specific components of the IMC theory, such as the hierarchy of effects of communication, brand positioning, personality and proposition, communication touchpoints to reach and target new donors, digital advocacy, and evaluating communication effectiveness. Last, I discuss nonprofit businesses and the economy, nonprofit challenges, and the importance of external communication strategies in the nonprofit sector.

External Communication

Communication is essential to business success. Communication occurs when two or more persons intentionally or instinctively try to influence each other using signs or words (Andrade Gabrich & Souza Sales, 2016). Bormane and Šķiltere (2018) asserted businesses use external communication messages aimed at stimulating and facilitating the awareness of customers and stakeholders to influence decision-making. Moreover, consistent and purposeful communication can be a powerful tool for business leaders seeking improved performance and growth (Bhayani, 2017). Billett et al. (2018) explained that external communications help to generate the interest and attention needed for starting up a business or generating growth, and external interfaces can provide business leaders a chance to create compelling and positive relationships, ensuring ongoing development of a brand. Companies rely on external communications to promote brand image, create awareness of products and services to influence action, and receive feedback on customer preferences to ensure they are responsive to customer and stakeholder needs (Bormane & Šķiltere, 2018). Nonprofit businesses suffer from insufficient resources and rely on external communications to inform and influence donors making effective external communication strategies vital to mission success (Hunt, McDonald, & Topaloglu, 2018; Keller, 2016).

Two-way communication is necessary in the business world for transmitting messages between key stakeholders. Bhayani (2017) stated two-way communication is essential for long-lasting, positive relationships with organizations and with the public. Billett et al. (2018) studied asymmetric communication within a firm and found that when a firm lacks a consistent interface, it diminishes the quality of external information communicated by that organization. Duralia (2018) explained that due to an unprecedented technological boom and fiercely competitive economy, business success relies on finding new ways of communicating to influence donor intentions. Kotler

(1979) argued that nonprofit leaders must focus on marketing goals, brand positioning, and even budgets to enhance external communication strategies and have a significant impact on the growth of a brand.

Businesses rely on customers and stakeholder communication to understand how the organization and products are performing, competitors' products and services, and the desires and expectations set by the customers to remain viable. The way an organization communicates with customers and stakeholders may determine the organization's long-term viability (Duralia, 2018). Nonprofit leaders should insert effective external communication strategies into their overall strategic planning efforts that incorporate two-way communication to understand the needs of the customers and to determine the improvements needed (Duralia, 2018). Šerić (2017) explained the strategic integration, coordination, and synergies of marketing communication tools, methods, and channels within a company maximize the communication effects at minimal costs. Business leaders incorporate communication strategies into the overall strategic plan to ensure the dissemination of accurate company and product information and ensure valuable customers, and stakeholder feedback is received to assure long-term sustainability.

As of 2019, there has been little research conducted on the topic of nonprofit organizations, IMC strategies, and the application of those strategies. Nonprofit organizations have limited resources for indirect expenses and often use antiquated technologies and processes (Guo & Saxton, 2018). Dunne (2018) claimed leaders could use design thinking as a process and a mindset that enables leaders to focus on three elements: customer needs, technology, and a business advantage to shift from tradition organizational practices to improved processes. Using the IMC strategies can aid nonprofit leaders in moving the traditional business advertising and promotional techniques into a consolidated effort using traditional methods and new technologies to connect with new donors and receive feedback with the use of technology. Therefore, further research on the IMC strategies and application in nonprofit organizations may give nonprofit leaders ways to increase the effectiveness of external communications and improve the financial sustainability of their organizations.

Integrated Marketing Communication Theory

The conceptual framework for this study was the IMC theory. Anantachart and Chaihanchanchai (2017) claimed that IMC concepts and strategies facilitate the use of diverse marketing and communications tools to maximize communication effects and increase cost effectiveness. Brinzea, Diaconu, and Oancea (2016) found business leaders use IMC strategies as a way to coordinate and manage external communications to enhance public relations and influence customer loyalty through clear and consistent messaging. Effective external communication enables stakeholders to form an emotional connection with the brand leading to increased giving behaviors (Anantachart & Chaihanchanchai, 2017; Brinzea et al., 2016; Keller, 2016).

Bormane and Šķiltere (2018) proposed leaders could use IMC as a business management tool to provide information and accelerate consumers' knowledge and experience concerning a product's value and use. Previous research associated with IMC theory is primarily associated with for-profit business marketing; however, Baack, Hartley, Patti, and van Dessel (2017) asserted IMC implementation is organizational dependent, suggesting IMC strategies are flexible and allow for adjustments according to the characteristics of a nonprofit organization. According to Keller (2016), the purpose of IMC is to identify and understand the successful methods for communicating and building relationships with potential customers and stakeholders, indicating the IMC theory was suitable as the conceptual framework for this study.

I chose the IMC theory as a lens for this study because the challenges of finding effective external communication strategies that span across all business sectors and promoting understanding of how nonprofit leaders use IMC strategies to attract new donors allowed me to focus the benefits of this study. Luxton, Mavondo, and Reid (2015) demonstrated that business leaders using unique IMC strategies experienced greater campaign effectiveness and brand differentiation leading to greater financial returns. In this study, I focused on using IMC strategies to provide nonprofit managers with insights on where to focus limited resources as well as how to capture customer data to target communications, increase responsiveness, and better meet the needs of the customers. Nonprofit organizations have relationships based on trust and external communication strategies are essential to building trust; therefore, using IMC strategies provides the ability to focus resources and target communications, which is critical to nonprofit leaders looking to attract new donors.

I considered the social exchange theory (SET) as a conceptual framework for this qualitative single case study. Blau introduced the SET in 1964, claiming a relationship is based on weighing the costs versus the rewards for each relationship participant (Birtch, Chiang, & Van Esch, 2016). Birtch et al. used the SET to explain that relationships are more likely to succeed when there are satisfaction and commitment through tangible and intangible rewards. In this single case study, I focused on the exploration of the nonprofit business sector where regulatory requirements limit the tangible rewards nonprofit leaders can provide. Therefore, the SET was not appropriate for this study because it did not identify methods of external communications but rather how mutually beneficial exchanges affect donor recruitment. The IMC theory was more suitable as the conceptual framework for this study.

Organizational variables may determine how leaders can successfully implement IMC strategies within the organization. Ots and Nyilasy (2017) investigated how IMC practices integrate into an organization. The researchers argued that the challenge of conducting IMC research is that the investigation must include both concept and processes. Ots and Nyilasy conducted a 2-year ethnographic study of a Swedish retailer using the practice theory as a lens to guide the study. The researchers discovered that organizational variables, such as experience and understanding of the operational level of practitioners facilitating the implementation, could determine the success of the IMC program. Moreover, the researchers noted that to practice IMC, organizations had to select the routines, processes, and materials for execution that fit for their organization. Barger, Payne, and Peltier (2017) argued that business leaders are not efficiently aligning brand messaging strategies and communication strategies across touchpoints to reach the goal of consistent messaging; therefore, brand loyalty may suffer. IMC strategies are appropriate for nonprofit organizations suffering from limited resources to build a strategy to match the capability and capacity of their resources.

Adebiyi and Oluwafemi (2018) investigated how IMC processes influenced customer loyalty to cell phone providers. The researchers used data collected from 134 respondents in a cross-sectional survey design and argued the IMC framework influences customer loyalty through effective external communications and consistent messages about a company (i.e., its brand). Their results indicated IMC elements accounted for 48% variance in customer loyalty; therefore, using IMC for strategic planning efforts in targeting new consumers or donors may increase sales or support. Lee, Place, and Smith (2016) believed IMC strategies were started as frequency or loyalty marketing and grew into relationship marketing, as it is known as today. The evidence from Adebiyi and Oluwafemi’s study indicated IMC could improve external communications with customers as a way to increase sales while gaining support from new customers.

Leaders of social organizations need to find new, innovative social marketing approaches to develop better, unique external communication strategies to gain new donor support. Antonovici, Matei, and Săvulescu (2015) conducted research aimed at the integration, innovation, and operationalization of social marketing to create value in society. The researchers claimed that social marketing is critical for soliciting a response from individual donors based on personal values. Barger et al. (2017) found that the way to improve customer engagement and profitability depends on leaders knowing and understanding customers’ online and offline touchpoints. Antonovici et al. found an integrated approach using multiple channels and two-way communication between a public organization providing services and the service beneficiary enhances the efficiency and value of the communication process within the community.

The IMC framework allowed me to understand a more combined approach to external communication strategies for nonprofit leaders. Nonprofit businesses are dependent on fundraising for revenue and inherently struggle with limited resources. Nonprofit leaders might benefit from using the IMC framework because it is a cost-effective, combined approach to external communication strategies guaranteed to reach new donors and gain support.

With the inception of the Internet in the 21st century, access to information is a driving force for consumer behavior, making communication one of the most critical business activities needed to build and strengthen profitable relationships and influence behavior and commitment (Brinzea et al., 2016; Pluta-Olearnik, 2018). Additionally, the IMC framework arose from the rapid development of technology and the need for more efficient and effective ways to communicate within a company and with millennial stakeholders and customers (Pluta-Olearnik, 2018). According to Ewing, Maplestone, Polonsky, and Valos (2017), IMC strategies should include using new technology to find a strategic mix of communication channels that reach all generations of donors and customers to successfully influence how an organization is perceived and establish trust and loyalty. Baack et al. (2017) added stakeholder perceptions are a vital component to the success or failure to an organization; therefore, it is critical that organizations align communications into clear, concise, and customer-oriented messages. The IMC marketing-mix approach exercising new technologies can change the way businesses communicate to become more interactive, highly responsive, and connected with stakeholders and customers.

The IMC concept is the foundation to create strategies that use the skillful coordination and mix of different marketing communication tools to send a consistent message to persuade customers through the synergies of two or more communication elements (Kim, Kim, & Marshall, 2016). However, Pluta-Olearnik (2018) authored an article suggesting that a company's requirements for efficient communication lack the justification for the deliberate change from traditional methods should focus on marketing strategies on operations and brand marketing to increase sales. Furthermore, Brinzea et al. (2016) noted traditional marketing communication methods allowed sales teams to use different tools such as advertising, promotion of sales, direct sales, and public relations to produce the desired effects; yet, the various channels demanded more organizational resources and funding. Consequently, the researchers found that the IMC approach provided synergies that proved to be more beneficial than the total effects of the individual instruments used previously.

Integrated Marketing Communications Benefits

The IMC theory conceptual framework used for this study has many benefits. According to Czaplewski and Key (2017), the IMC theory defined ways businesses can communicate their brand's story, target messaging, and improve customer engagement. Business leaders use the approach to facilitate communication across various forums and digital interfaces to create brand awareness and enhance performance through marketing objectives. Keller (2016) described the principle benefits realized when developing an IMC strategies concept include (a) improved image, dialog, and relationship building; (b) more excellent brand/product knowledge and awareness for increased performance effectiveness; (c) reaching a broader audience; (d) cost savings; (e) message reliability; and (f) relationship marketing. Rajeev and Keller (2016) emphasized that although the benefits are all-encompassing, using IMC concepts, allow leaders to shape communication strategies to fit specific business needs to hone in on an improved image, dialog, and relationship building which are vital for nonprofit businesses to stay connected in the 21st-century business environment.

Image, dialog, and relationship building. In this business environment, marketing managers are taking a holistic approach, and that goes beyond just advertising. Šerić (2017) collected and analyzed data from 475 customers to corroborate the relationships between IMC and social media and the impacts of IMC on brand equity. The researcher found positive results when all the organizations' advertising and promotional communications efforts were compatible and sent a consolidated message that improved the image of a company. The consistent messaging helped to develop trust and opened a dialogue with customers that improved the relationships with present and future internal or external and stakeholders. Anantachart and Chaihanchanchai (2017) found that a critical component of the IMC is to establish and nurture good relationships with customers, which leads to repurchase and word of mouth advertising. Akbar and

Brand authenticity is vital to building trust with customer groups and stakeholders. Akbar and Wymer (2017) stated that the organization's leaders could create brand authenticity by investing the time spread the brand meaning thorough the organization by way of informing employees what the brand is about and the values behind the brand name. Bernytė (2018) used IMC strategies as a conceptual framework in a study to understand the impacts of exploiting food retailers' values and principles through brand messaging. Bernytė (2018) demonstrated the associations between implementing IMC strategies of food retailers and the positive impact on the brand's marketing and sustainability. Building an organization's image, dialog, and relationship building through strategic branding may help send a recognizable and consistent message out to promote awareness and advocacy.

Brand and product knowledge. Leaders of organizations use external communications to convey messages about the business, products, and services used for promotional and marketing purposes. Sending and receiving information such as brand and product knowledge, awareness, seek preferences, principles, and buying behavior are the goals of external communications within a business context (Czaplewski & Key, 2017; Dulewski & Jarosławska-Sobór, 2018). Because awareness and knowledge demand a level of cognitive processing, communication effects should consider how the receiver would respond to a message to predict the responder's actual behavior. Czaplewski and Key (2017) developed and presented a five-stage IMC approach, which included the importance of message creation and focusing on conveying the required information with little potential for distortion and clutter. Findings indicated the use of the five-stage IMC approach reduced customer confusion about a product, updated new information about a product or special offers, and gave reminders about existing products and services. Implementing brand advocacy leads to better awareness and knowledge about the business, products, performance, and what influences buying decisions to increase sales and production.

Increased performance effectiveness is a valuable benefit derived from IMC strategies. An effective communication strategy is essential to business success; understanding customer preferences, ways to engagement the customer, and discover competitor capabilities, the more a company can direct its marketing campaign to increase sales, or support, and gain a more significant share in the marketplace (Keller, 2016; Trantopoulos, von Krogh, Wallin, & Woerter, 2017). Keller (2016) suggested businesses can increase profits and grow brand equity by developing an effective IMC strategy that sends a clear and consistent message about the products and services from multiple channels, may help gain consumer trust, and serves to build profitable long-term relationships. The goal of IMC strategies is to improve a company's position in the marketplace, gain a competitive advantage, and enhance business performance (Blazeska & Naumovska, 2016; Luxton, Mavondo, & Reid, 2017; Trantopoulos et al., 2017). Communication messages and using the right channels that reach audiences of different ages and cultures can effectively achieve performance goals.

Reach a broader audience. The increase in Internet usage and new technology that connects the world instantaneously, and with the right tools, businesses can reach all customers and audiences (Hommerová & Severová, 2019). Turner (2017) argued increased saturation in the marketplace causes increased advertising clutter, targeting precise messaging is the key to effectively communicating over several internet channels. Therefore, using IMC to stretch messages across a variety of communication channels and media outlets creates the ability to deliver information toward more specific target audiences and increases the probability of those customers repurchasing goods or services. Reaching a broader audience increases consumer empowerment and provides more avenues to promote brand advocacy, product awareness, and to increase sales (Quach & Thaichon, 2016). Using targeted communications channels to reach individuals of all ages, cultures, and in any location, is a low-cost opportunity to reach new customers and advocate for greater support.

Cost savings. Using IMC strategies combines resources and eliminates the costs associated with traditional and distinct agencies; thus, resulting in cost savings by cutting down on the number of agencies involved in a transaction (Bormane & Šķiltere, 2018). Implementation of these types of marketing communications focuses on using one agency, which coordinates the photography, design, and printing of an advertisement or other sales information. The use of the IMC strategy also prevents the duplication of graphics and unnecessary reproduction (Bormane & Šķiltere, 2018; Pluta-Olearnik, 2018). Additionally, Ots and Nyilasy (2017) asserted that companies could measure cost savings by comparing marketing communication costs compared to market share gained, or financially by increased sales, increased number of customers or supporters, and return customer purchases. Businesses frequently experience conflict in the effort to keep overhead expenses to a minimum; thus, integrating marketing and communication agencies, aligning messages, and streamlining communications channels are necessary to decrease the costs and increase reliable communications (Pluta-Olearnik, 2018). Using IMC strategies may lead to cost savings for businesses with limited.

Message reliability. Unaligned marketing communications result in disjointed marketing messages that dilute the impact of the words, and many messages may not carry over, be misunderstood, or merely be ignored by buyers because of unreliability (Naznin & Reilly, 2018). However, the IMC strategy's capacity for users to create practical communication tools that offer messages and information that are reliable, inspirational, and are easily understood enables more efficient and sophisticated communication, which ensures marketers send strong, consistent messages and information to customers. Reliable messages may influence customers to view the company, product, or service offering in a positive way (Turner, 2017). A customer's loyalty may depend upon the reliability of messages.

Relationship marketing. Relationship marketing is integral to the IMC concept and is a crucial benefit for nonprofit organizations dependent on donors' relationships for financial capital. Duralia (2018) claimed a vital principle of the IMC strategy is relationship marketing, which focuses on customer satisfaction and retention by recognizing the value of customer relationships in the long-term. The use of IMC helps create avenues to build a bond of loyalty and long-term support; thus, resulting in a competitive advantage by offering greater customer value.

IMC is an approach to communication planning that provides many benefits to businesses, such as better results from promotional events and reduced marketing costs (Larya & Reilly, 2018). Using IMC helps mitigate the message reliability problem that arises from segregated marketing efforts providing a clear and consistent message. Bormane and Šķiltere (2018) argued that the integration of marketing tools such as direct mail, telemarketing, and social media all choreographed succinctly allows for direct messaging to targeted donors ensuring maximum messages impact. The central theme and why the IMC strategy is the conceptual framework for this study is because IMC delivers the same information in all external communications interactions, the messages reinforce each other, and improve marketing effectiveness. Businesses depend on customers for success, and they rely on relationships for long-term sustainment; therefore, the way customers interact and communicate with external stakeholders is essential to sustainability (Larya & Reilly, 2018; Turner, 2017). The way a business communication with external customers and stakeholders may determine the loyalty to the brand or organization.

Components of Integrated Marketing

Businesses considering developing IMC strategies must understand the underlying components to formulate effective external communication methods for successfully attracting new donors. Anantachart and Chaihanchanchai (2017) conducted a study aimed at the definition, the benefits, the drawbacks, and principal components of the IMC theory. Some of the primary ingredients are the hierarchy of marketing communication effects, brand, communication touchpoints to reach target consumers, clear and consistent messages across channels, design messages for implementation, and measure effectiveness of messaging through feedback and the future of IMC (Anantachart & Chaihanchanchai, 2017; Henley, 2001). The researchers discovered that understanding the concepts and principles associated with IMC was essential for business success and indicated advances in technology as one of the main drivers of the IMC concept (Anantachart & Chaihanchanchai, 2017). The IMC leverages old and new methodologies and technology to facilitate and integrate the messaging process to educate, engage, mobilize, and build relationships with a vast audience of current and potential supporters (Guo & Saxton, 2018). IMC strategy implementation can be successful if leaders and managers understand the principles surrounding communication effects, targeted messaging, and evaluation needed to employ all these principles synergistically.

Hierarchy of communication effects. The primary purpose of a business's external communications is to compel customers to act. The hierarchy of the communication effects should be the center of an organization's activities and messaging such as positioning, personality, and the proposition to drive the impact of communications (Dulewski & Jarosławska-Sobór, 2018; Genchev & Todorova, 2017). IMC strategically combines on and offline messages to build awareness, knowledge, and ultimately unite the business preferences with the customer, guide perceptions, achieve specific objectives, and create behaviors where the customer responds to those messages (Czaplewski, & Key, 2017; Dulewski & Jarosławska-Sobór, 2018). Luxton et al. (2017) showed how IMC capability connects to marketing and brand advocacy to improve organizational performance. The IMC strategic alignment of messaging and the specialized mix of communications tools give organizations the ability to achieve their desired effects (Luxton et al., 2017). Nonprofit external communications focused on positioning, personality, and the proposition creates a powerful platform for brand advocacy.

Brand. Businesses rely on external communications to promote brand image, create awareness of products and services. Brand characteristics play a critical role in communicating its value and quality to the public. Brand positioning is an effort to establish a company's reputation and connects emotionally with customers to become unique and form lasting, loyal relationships (Becker, Clement, Langmaack, & Shehu, 2016). Billett et al. (2018) claimed that a business's external communication strategy plays a significant role in brand positioning and personality to influence positive public perception. Helberger, Smit, Strycharz, and van Noort (2019) asserted that consumers emotionally connected with a brand become long-term loyal advocates and are willing to repurchase the brand, more importantly, a firm's brand is an offer of a promise and affects the success of a business. Brand positioning and personality characteristics influence the culture and performance of the organization, and brand proposition can be conveyed through the brand message (Helberger et al., 2019). However, using external communications strategies to enhance exposure to an organization's message, product quality, and activities may enhance growth; thus, improving total performance.

Researchers agree that optimized communication through consistent messaging of the company's brand to build long-term relationships is the objective of the IMC concept. Campbell and Lambright (2017) used stewardship theory to study challenges related to funders for human services providers' performance management. Analysis of interview and survey data collected from donors of public and nonprofit providers revealed that public and nonprofit organizations failed to meet the reporting requirements needed to satisfy the desired confidence level in the performance of services provided. However, the researchers discovered that funders for nonprofit providers have better relationships and brand connections that allow for informal comprehensive feedback of provider performance and encourage long-term funding or assistance with unexpected struggles. The IMC concept focuses on relationship and trust-building to increase funding avenues making IMC beneficial for nonprofit leaders in pursuing external communication strategies.

A brand message can influence consumer buying decisions based on positive customer satisfaction, which determines the reputation of a business. According to Chiu, Lai, Pai, and Yang (2015), public perception, trust, and brand association have a significant influence on customer brand identity, customer loyalty, and the development of continuing customer-business relationships. Reputation is vital to the success of a business; brand messaging shapes the perception of a product or service quality (Becker et al., 2016; Nijssen & Schepers, 2018). Eelen, Özturan, and Verlegh (2017) found a different impact to brand loyalty when marketers used online media-verse word of mouth, or in-person channels brand advocacy campaigns, word of mouth campaigns established a greater self-brand connection leading to brand loyalty. Therefore, branding should be a vital component of an external communication strategy. The brand of the company should attempt to emotionally connect with the target audience and leave a lasting impression that represents the quality of services or products (Eelen et al., 2017). Nonprofit leaders struggle with investing in marketing costs; therefore, developing a holistic brand statement that is recognizable helps leaders to connect emotionally with donors and shape donor perceptions.

Communication touchpoints. Marketing managers use touchpoints as channels to advertise and promote products to target audiences. Business leaders use for advertising and promoting products to target audiences (Baxendale, Macdonald, & Wilson, 2015). Coolsen, Quesenberry, and Wilkerson (2012) asserted effective communication strategies help develop a compelling customer experience using touchpoints, and IMC is capable of multiple touchpoints such as brand advocacy, advertising, in-store communications, word-of-mouth, and peer observation. Baxendale et al. (2015) studied the effect of touchpoints on brand consideration on four consumer products and discovered positive links between touchpoints and the prediction of customers' decisions to consider the brand. Integrating and coordinating all communication touchpoints to maximize customer influence is beneficial to marketing strategies. Technology is evolving at a rapid pace, and the number of people getting connected through the internet is causing a shift in the way businesses connect with customers (Ewing et al., 2017; Klepek, & Starzyczna, 2018). According to Diette, Helms-McCarty, and Holloway (2016), nonprofit leaders face three types of donors, existing donors, donors who have purchased similar products, and new donors and finding ways to reach all types of donors is essential. Coolsen et al. (2012) suggested the more marketing managers understand customers and the available avenues to effectively reach out and involve customers in promotions or activities may enhance the effectiveness of external communications and aid in influencing buying decisions. Selecting the appropriate touchpoints to reach customers allows businesses to ensure the right audience is receiving the information to motivate and influence buying behaviors potentially.

Digital advocacy. The two-way, interactive nature of digital communications capability has changed the way business leaders communicate with customers. Pluta-

Olearnik (2018) claimed the propagation of technology provided companies the opportunity to use complex two-way, interactive models of communication that consider mass communications, interpersonal techniques, and multimedia platforms to build relationships and influence the behaviors of customers through digital advocacy. Digital advocacy is a convenient way to establish and cultivate relationships and is more cost-effective than traditional advertising methods because of the unintended additional exposure through external posts; thereby, increasing awareness and improving performance (Felix, Hinsch, & Rauschnabel, 2016; Klepek, & Starzyczna, 2018). Nonprofit organizations depend on customer relationships; digital advocacy creates connections by giving the donors the ability to interact with nonprofit organizations through social media and conveniently make donations, see financial data, and assure progress through nonprofit websites.

Technology advancements keep individuals connected to family, friends, businesses, and social issues around the world. Guo and Saxton (2018) conducted a quantitative study using the IMC concepts and a framework that investigated the impact of social media on customer behavior, brand advocacy, and organizational performance through Twitter messages and retweets. Consistency in message content delivered to a targeted audience produced improved performance results and played a significant role in determining the customers' expected responses (Guo & Saxton, 2018). Carboni and Maxwell (2016) found that many independent organizations have Facebook as their only social media presence to reach customers; thus, to improve stakeholder engagement, corporate and individual business leaders should seek knowledge to understand social media engagement for increased interactive with customers. Nonprofit leaders should become educated on digital advocacy use social media to promote messages and gain support.

Social media is the way most individuals communicate or gain information about products and fads that gain popularity in a society (Bürger, 2015). Agozzino and Fleck (2016) indicated that 50% of U.S. adults have a Facebook account and actively log in once a month and view advertisements and share content. Digital assets such as websites, blogs, and microblogs facilitate two-way interaction, and engagement users can choose the content to view, respond to, and share with friends, family, and colleagues (Bürger, 2015; Felix et al., 2016). According to Eddosary, Kim, Ko, Sagas, and Park (2016), many people are skeptical at the trustworthiness of online advocacy, stating that it is just a clicking game instead of driving right action from the receiver. Technology is revolutionizing marketing communications, digital advertising, and social media enable businesses to reach stakeholders and decision-makers and exploit unknown opportunities (Leipnitz & Sundermann, 2019). Integrated marketing communication strategies use digital advocacy to reach an intended target and presume that the target audience is more likely to post, forward, or extend messages to their external networks in a similar manner (Eddosary et al., 2016). In the digital age, individuals share interests and posts; therefore, nonprofit leaders can use digital advocacy to push their messages far beyond expectations.

Message design and implementation. Business messages have many purposes, such as capturing attention and giving information, and the design of the message influences responses from the audience. Business messages have many objectives, such as capturing attention and delivering information (Blazeska & Naumovska, 2016). Therefore, the design of the message determines the response from the audience. According to Hongcharu (2017), designing compelling message using a cross-functional process are linked together to get the audience's attention and maintain a curiosity toward the communications about the brand of products can influence how consumers search for information and evaluate alternatives. The IMC concept strategically controls the impact of all messages sent to the targeted stakeholders to ensure the development and to cultivate profitable relationships with customers and other stakeholders (Baghi & Gabrielli, 2016; Blazeska & Naumovska, 2016). Customers not familiar with the brand may view excess messages and ads as clutter, and the communication effort is less likely to gain attention (Blazeska & Naumovska, 2016). The IMC process calls for a unique message using different promotional tools for each target segment of stakeholders, and it is critically important that all messages and themes are consistent and reliable to influence customer perceived value (Blazeska & Naumovska, 2016; Genchev & Todorova, 2017). Baghi and Gabrielli (2016) claimed an essential aspect of the IMC strategy is the flexibility to adjust the selected channels based on the market sector needs and changes. The design and strategic control of messaging can influence customers buying behavior, build relationships, and promote interactive and effective communication between stakeholders and the organization.

Huang, Millette, Seelig, and Zhou, (2019) examined factors that influence donation behavior to content creators such as live broadcasters on social media. The researchers created a model to assess how social factors such as identification, interaction, and information value and sociability and personalization technological factors impact an individual's intention to donate. Huang et al. discovered that users functionally dependent on social media and the donor's emotional attachment to the content creator positively influence donation behaviors. Additionally, researchers have noted that social media is interactive and may better meet customer needs, inspire and strengthen long-term relationships, and provide more opportunities to influence individuals to donate (Felix et al., 2016; Huang et al., 2019; Klepek & Starzyczna, 2018). Using technology and internet businesses can develop effective communications to market, inform, and listen to customers simultaneously; thereby, increasing competitiveness and achievement of organizational goals.

Evaluation of effectiveness. The final step in the IMC process is to evaluate feedback from targeted stakeholders on marketing message and channel effectiveness to determine the impacts on customer behavior to redefine the scope of communications (Čačija, 2016). Using quantitative analysis of survey data, Kim, Kitchen, and Schultz (2008) examined public relations and advertising agencies in Korea, the United States, and the United Kingdom focused using IMC strategies in areas such as marketing and promotional conceptual change, strategic evaluation, and evaluation according to operation. Kim et al. found that there are companies in all countries where public relations agencies fully understand the IMC concepts and are actively implementing IMC programs; however, the IMC definition varied considerably among the nations. Furthermore, the respondents pointed out there is not enough planning before implementation to avoid problems, and evaluation methods are weak. The researchers discovered that evaluation metrics are needed to guide IMC implementation.

Campbell and Lambright (2017) examined that the performance measurement process challenges of public and nonprofit human service funders and the approaches they use to mitigate them. The researchers collected data from surveys and interviews to evaluate experiences from funders throughout a region. Campbell and Lambright learned the primary challenges were issues with collecting performance data and do not comply because the limited resources cannot create metrics from performance information because of the lack of time. These findings were consistent with the majority of respondents and useful for leaders to understand that mitigation strategies will depend on the specific environment. Campbell and Lambright's study aligns with the flexibility provided when IMC strategies.

To effectively evaluate an organization's IMC planning strategy, leaders must understand their customers and the impact of the various marketing communication tools (Hong & Lee, 2018). Beer and Micheli (2017) argued that businesses evaluate and measure the output of their communications, versus the outcome, which can be very tenuous. Additionally, Čačija (2016) stated the tools and how they integrate or what the interactive effects on the integrated mix maybe can be challenging to measure. Alternatively, Hong and Lee (2018) asserted that the evaluation of the effectiveness of messaging should consider the elements of each communication tool that elicits the response process of consumers. Feedback is an essential factor in communication; it allows businesses to understand the market, customer preferences, and aids in strategic planning.

IMC Implementation Challenges

Change is inherently difficult unless there are knowledge, understanding, and communications during the process of change. Anantachart and Chaihanchanchai (2017) argued that a lack of knowledge of IMC concepts and principles at the corporate level was a crucial factor in failed IMC strategy implementation. Additionally, Choi (2016) noted that business organizations with a rigid organizational structure, a decentralized work environment, and a lack of leadership and management support are the main barriers to new marketing approaches. Organizational leadership must provide knowledge about how and why things need to change, plan updates throughout the process, and show progress results to all stakeholders to monitor the response and effectiveness of the change (Hong & Lee, 2018). Adopting IMC and new external communication strategies in nonprofit organizations present challenges because if nonprofit leaders are meeting mission goals with the current resources, change may be too costly; however, the findings from this study may provide evidence that the benefits are worth the costs.

Nonprofit Sector Importance to the U.S. Economy

The nonprofit sector is the central provider of human and social services and the driving economic force in the United States (Hu & Kapucu, 2017). Uniquely designed by their mission, size, program goals, and communities, all nonprofit organizations are focused on the social mission that aimed to serve a community. Many scholars and practitioners are concerned with the rapid growth of the nonprofit sector in the last decade and its impact on nonprofit financial sustainability (An, Bullock, Christensen, Nesbit, & Paarlberg, 2018). Mitchell and Berlan (2016) claimed that between 2003 and 2013, public charity revenue grew 40.6% in the United States. To further explain, An et al. (2018) stated an overcrowded nonprofit marketplace induces competitive pressures that can affect donor support and growth; thus, weakening the overall impact of the nonprofit sector. Hunt et al. (2018) suggested that increased competition diminishes the financial sustainability of charitable organizations that rely on granting institutions or donations as the primary source of income to survive are at risk. The following is an overview of some of the nonprofit challenges with which organizations contend and the importance of external communication strategies in the nonprofit sector.

The fundraising activities offered by a nonprofit organization must be beneficial for the community it serves and contributes to society's advancement to gain support. Fyall (2016) explained that the number of charitable establishments in the United States is growing, yet individual donors remain steady; thus, creating a competitive market for donor attention and support. Plighted with limited resources, when designing, implementing, and evaluating social marketing campaigns, nonprofit leaders must plan strategically (Carton, McCormick-Ricket, Kingsmill, Ledford, & Rudov, 2017). Carton et al. (2017) argued that media campaigns alone are a useful tool for nonprofit organizations with limited capacity, resources, and financial constraints because the message reaches a broad audience with a single message. Old and new marketing methods are useful as an integrated approach to effectively reach and influence all types of donors (Guo & Saxton, 2018). Fundraising is a crucial activity for nonprofit organizations and effective external communications a vital component for fundraising success

Nonprofit challenges. In a globally unpredictable and ever-changing environment, nonprofits dependent on grants and donations are more likely to experience funding uncertainty caused by a crisis. Thus, when compared to for-profit businesses, nonprofits are at higher risk from economic downturns, disruptions of mission delivery, stakeholder challenges, and unanticipated occurrences (Sabri, 2018). Gilstrap, Gilstrap, Holderby, and Valera (2015) examined the complexity of nonprofit leaders' sensemaking during organizational crises. The researchers interviewed 43 nonprofit leaders across 15 states in the United States to identify qualities nonprofit leaders use to understand and appreciate unanticipated changes within an organization. Gilstrap et al. found key characteristics for effective leadership during a crisis are: encouraging team dynamics, promoting strategic thinking, remaining transparency with stakeholders, enabling responsiveness, being self-composed, and encouraging preparedness. Gilstrap et al. highlighted that those nonprofit leaders could leverage these qualities to develop strategies to assess organizational risks and develop mitigation plans to avert or minimize the impact of a crisis and to facilitate corporate longevity. Nonprofits rely on the compassion and giving of others and continue to struggle with adapting to change, lack of resources, and finding new ways to gain financial support is a constant battle.

Nonprofit leaders must adopt strategies and processes to meet the latest cultural demands. Nonprofit organizations remain dedicated to serving vulnerable members of society (Faulkner & Romaniuk, 2019). The development of technology during the millennial generation created a culture where the millennials are considered the digital generation and the most significant number of potential donors for charitable organizations. Crawford and Jackson (2019) argued that nonprofit leaders must adapt marketing aimed at the millennial generation through the application of social networking that social media sites facilitate. Crawford and Jackson indicated that social media sites have more than 2 billion users that provides an open-access typical environment for individuals to interact. Therefore, nonprofit leaders investing in integrating technology into their external communication strategies will remain competitive.

Nonprofit organizations remain dedicated to serving vulnerable members of society. Grasse et al. (2016) identified that nonprofit organizations experience the challenges of an overloaded nonprofit sector, and for-profit firms adopting CSR strategies increase the competition for gaining new donor support. Grasse et al. assessed how increased competition impacted various funding streams for nonprofit organizations, uncovering how some nonprofit organizations lack resources, lack skills, and how insufficient time availability made it challenging to develop marketing plans that effectively target, communicate, and compel new donors. Grasse et al. suggested that nonprofits with dedicated resources in marketing communications are more capable of influencing donor support decisions. Faulkner and Romaniuk (2019) described IMC strategies as flexible and cost-effective marketing communications. Nonprofit leaders may benefit from implementing IMC strategies to meet their needs.

However, Carton et al. (2017) argued media campaigns alone are a useful tool for nonprofit organizations with limited capacity, resources, and financial constraints because the message reaches a broad audience with a single message. Nonprofit organizations must balance their resources with the need to support the organization financially and invest in communications to the donors who make the mission possible (Čačija, 2016). Most nonprofits struggle with limited resources but investing in creating synergistic effects through the integration of external communication strategies with aid in making to most out of what resources are available.

Having full knowledge of the costs associated with being a nonprofit is critical. Čačija (2016) stated that many nonprofit leaders do not consider the total costs of doing business. Haleem et al. (2017) noted that the benefit of a nonprofit organization's self-reliance affects the nonprofit's future concerning self-sustainability. Haleem et al. found that nonprofit organizations incur substantial overhead expenses related to employing a full-time workforce. Haleem et al. found that nonprofit organizations incur substantial overhead expenses related to employing a full-time workforce. Despite realized successes and positive donor reports, frequently donor funding does not cover substantial overhead expenses. Haleem et al. argued that nonprofits that depend on donations and funding from private individuals should maintain a small group of core employees to reduce overhead costs and ensure the long-term sustainability of the organization. In addition, Haleem et al. suggested that nonprofit organizations can find ways to create cost savings through erecting partnerships with other charitable organizations. Moreover, Hu and Kapucu (2017) examined nonprofit vulnerability in Florida and the factors that influenced nonprofit financial performance in the region. The researchers discovered strategic plan execution, board involvement, and certainty in revenue sources, such as in gaining donor support, are critical to remaining solvent during economic downturns and other limiting circumstances.

The leaders of nonprofit organizations rely on making a connection to all members of the community it serves. With the rising elderly generation in the United States, it is essential to understand the roles and influences this distinct group of nonprofit stakeholders has on nonprofit growth (Van Puyvelde & Brown, 2016). Grasse et al. (2016) found that developing and cultivating long-term stakeholder relationships can be challenging to nonprofit organizations with few resources; however, using various channels to communicate with all generations is vital to maintain and improve support. Being successful as a nonprofit is dependent on many different segments of the population (Van Puyvelde & Brown, 2016). Van Puyvelde and Brown (2016) investigated the existence of nonprofit organizations through an examination of the makeup of the nonprofit sector's density using a target population from 254 counties in Texas across all nonprofit sectors. The researchers found that more highly populated areas, and areas with communities over 65 years old, has a more significant need to establish a nonprofit organization and a higher nonprofit sector density. Nonprofits are established to serve a community in need to improve the quality of life for that community; therefore, it is essential to communicate with all engaging stakeholders to promote organizational success.

Importance of external communication strategies in the nonprofit sector. External communication is vital to nonprofit organization to advocate for the social mission, and to inform donors and volunteers of special events, specific needs, and to gather feedback. Faulkner and Romaniuk (2019) noted that competition in the nonprofit sector is raising the stakes, and nonprofit organizations are called to action to mobilize, engage, and communicate with their stakeholders, making fruitful conversations an imperative. Guo and Saxton (2018) studied why nonprofits struggle to attract and maintain supporters and the amount and quality of the public's attention over social media channels. Guo and Saxton discovered that the size of the organizations, activity level, visual content, and targeting strategy all played a significant role in the organization's social media message attention and concluded that nonprofit leadership should focus resources on managing social media channels to improve the performance impact of social media marketing.

Some view marketing methods used by the for-profit sector as producing a negative social image; thus, most nonprofit leaders focus on meeting mission and beneficiary care rather than engaging in social media, which causes challenges to nonprofit sustainability (Shin, Ge, & Qin, 2017). With the rapid growth occurring in the nonprofit sector, competition is fierce because financial and human resources (HR) are scarce, and nonprofits must compete by establishing a position and sharpening communication efforts toward target stakeholders. Additionally, Čačija (2016) asserted that measuring the effects of nonprofit marketing is challenging, and while reaching the goal determines success, the social performance characteristics are challenging to define. The use of IMC strategies can strengthen a nonprofit brand by telling a consistent story that is aligned with donor values and communicated to a targeted audience; thus, dispelling the negative image of nonprofit organizations by marketing capabilities (Shin et al., 2017). Nonprofits organizations can make gains in attracting new donors while reducing costs when strategically implementing IMC strategies.

The IMC conceptual framework used for this study is vital to nonprofits obtaining funding through the participation of the stakeholders. According to Czaplewski and Key (2017), the IMC theory defined ways businesses can communicate their brand's story, message, and improve customer engagement. Business leaders use the approach to facilitate communication across various forums and digital interfaces to create brand awareness and enhance performance through marketing objectives in an era where the internet has changed the world through online global communications (Pluta-Olearnik, 2018). The IMC theory is a fitting conceptual framework for this study because the purpose of the IMC to identify and understand successful methods for building relationships with potential stakeholders addresses the research question regarding the use of effective external communication strategies to attract new donors. Nonprofit leaders should insert effective external communication strategies into the overall strategic planning efforts that incorporate two-way communication to understand the needs of the customers and to determine the improvements needed.

In this literature review, scholarly evidence is outlined that identified ways for nonprofit businesses to seek opportunities to enhance external communications through IMC strategies. Even though adopting IMC and new external communication strategies in nonprofit organizations may present challenges concerning nonprofit leaders not meeting mission goals with the current resources and the cost of change, the findings from this study may provide evidence that the benefits are worth the costs. Baghi and Gabrielli

(2016) asserted that a vital aspect of the IMC strategy is the flexibility to adjust the selected channels based on the market sector needs and changes. The design and strategic control of messaging can influence customers buying behavior, build relationships, and promote interactive and effective communication between stakeholders and the organization (Genchev & Todorova, 2017). Nonprofits leaders must understand customers and the available avenues to effectively reach out and involve customers in promotions or activities to enhance the effectiveness of external communications.

Transition

In Section 1, I focused on the specific business problem that some nonprofit SLs lack external communication strategies to attract new donors. Next, I explained that the purpose of this qualitative single case study is to explore effective external communication strategies by nonprofit leaders to attract new donors, with a specific focus on nonprofit leaders in southern California. Moreover, I explained that through organization document analysis and a series of semistructured interviews using the Baldrige Excellence Framework to guide the questions, the participants revealed practical understandings and experiences to describe the phenomenon. Finally, the review of the literature provided a background to the benefits and components of IMC strategies, the conceptual framework for this study.

Additionally, the literature review included critical points about a lack of research on nonprofit communication strategies. Researchers and scholars identified that the nonprofit sector and for-profit sector faced similar challenges regarding competition; yet, provided little evidence of charitable external communication strategies. The evaluation of the literature assisted in identifying the necessity for nonprofit leaders to adopt external communication strategies designed to attract new donors. In Section 2, I describe the role of the researcher, the research method, ethical research, and details on the case study analysis process. In Section 3, I conveyed the results and describe the practical applications and change effects possible from this study.

Section 2: The Project

I open Section 2 with the purpose of the study. Next, I describe the researcher's role, the methodology and design used in the study, the participants and sampling, as well as the data collection and data analysis processes. Most importantly, ethical research, reliability, and the validity of the study are clarified to protect the participants and ensure a sound and informed qualitative research study.

Purpose Statement

The purpose of this qualitative single case study was to explore effective external communication strategies used by nonprofit SLs to attract new donors. The targeted population consisted of SLs from a nonprofit research organization located in southern California. The SLs chosen as the population in this study had over 20 years of experience in a successful nonprofit organization, were key planners and decision-makers responsible for developing effective organizational strategies, and had a proven record growing new donor contributions. The results from this study have the potential to promote positive social change by increasing funding, which could increase the discovery of innovative treatments and cures to improve the lives of families and children affected by pediatric cancer.

Role of the Researcher

The researcher in qualitative studies is the mechanism used to collect, analyze, verify, and report data by accessing the thoughts and feelings of study participants (Marshall & Rossman (2016). Abdalla, Azevedo, Oliveira, and Gonzalez (2018) conducted a study aimed at guiding researchers to achieve quality in qualitative research, asserting that in the qualitative data collection process, the researcher has to provide context and an understanding of the participants' views and experiences to readers. Marshall and Rossman (2016) stated that the researcher is the data collection instrument and must reflect on their thoughts and ideas before and during the research process to ensure the reliability and quality of the data. I was the primary instrument used for collecting data in this study through semistructured interviews with the participants and organization document analysis. Methodological triangulation was used to achieve convergence and corroboration across the data collection techniques in this qualitative case study. Yin (2018) explained how thematic analysis and inductive reasoning provides a way to ascertain context that leads to a better understanding. To extend knowledge and understanding of effective external communications strategies, all of the data collected for this qualitative single case study were evaluated and analyzed for themes.

The researcher's view of the world and topic forces inherent biases that must be understood to avoid the potential to influence the collection of data and research study outcomes (Baraldi, Gregori, Perna, & Runfola, 2016; Yin, 2016). I reflected on my experience as a for-profit small business leader as I conducted my research. Working as the innovation and new products division vice president gave me an understanding of external communications, marketing, and relationship management as it relates to business growth. Although I do not have nonprofit business experience, I am familiar with the external communication methods and challenges, which participants revealed, and the need for revenue growth. The lens through which I viewed the research topic allowed me to offer insight from a competitive marketplace to provide more depth to the current nonprofit leader's external communication perspectives.

Sawicki (2017) explained the participants' experiences are personal and may be sensitive; therefore, the researcher is responsible for safeguarding participants' data, reassuring each participant by describing the mechanisms for safeguarding the data, and obtaining approval from the applicable research ethics review board. *The Belmont Report* (National Commission for the Protection of Human Subjects of Biomedical and Behavioral Research, 1979) guided the ethical practices I used in this study. I used the core ethical principles of respect of persons, beneficence, and justice to assess of risks and benefit of my research, provided a clear understanding of the researcher's role in ethical research, and showed the importance of informed consent and respect for persons (National Commission for the Protection of Human Subjects of Biomedical and Behavioral Research, 1979). Roth and von Unger (2018) asserted that bias and subjectivity are not inherently harmful or are they unavoidable. It is the researcher's role to avoid preconceptions and to understand the filters through which data are collected, analyzed, and reported (Roth & von Unger, 2018). According to Iguchi, Panicker, and Ross (2018), depending on the sensitivity of the data, researchers may share the publishing of the data with participants for further assurance. During this study, I received Institutional Review Board (IRB) approval and informed consent before collecting any data and adequately revealed and addressed potential biases using self-reflection methods to mitigate biases during the data collection and analysis process.

The Baldrige assessment interview questions were developed using the 2019–2020 Baldrige Performance Excellence Program (BPEP; 2018) as for a guide. The interview questions used for this study included the Baldrige assessment interview questions and the interview questions developed to answer the research question: What effective external communication strategies do nonprofit leaders use to attract new donors? Castillo-Montoya (2016) found that using techniques such as semistructured interviews for qualitative research are useful to describe and give meaning to the phenomenon under study through the perspectives of the participants. I used semistructured interviews as one of the data collection methods for this study to understand the participants' experiences and provide a depth of understanding needed for this study. I prepared and provided an interview protocol (see Appendix) for each participant before the interview to ensure the process for conducting all interviews was consistent and professional. According to Thomas (2017), stopping throughout the session and immediately after the interview to review the shared information is one of the most common forms of member checking and helps to assure accuracy concerning what the participants shared. I recorded the interviews and transcribed the recorded files so participants could validate the interview data. Understanding researcher and participant bias is the key to avoidance; therefore, to mitigate researcher bias, the data collected during interviews were verified with the client organization documentation and member checked by the participants who reviewed the transcripts to ensure that the information shared and my interpretations were accurate.

Participants

The participants for this study included three SLs from a nonprofit organization in southern California with experience in successfully attracting new donors using external communications. According to Bastos, Bonamigo, Duquia, Gonzalez-Chica, and Martinez-Mesa (2016), a research sample of participants were selected based on the target population that corresponds to the entire set of subjects identified in a research study. Walden University Doctor of Business Administration (DBA) Consulting Capstone Program administrators selected, evaluated, and assigned the research target population and purposefully selected sample participants for this study. Research participant eligibility criteria necessitated that researchers choose participant characteristics that align with the overarching research question (Alexander, Kiernan, Oppezzo, & Resnicow, 2018; Allen et al., 2018). The roles of the participating SLs included developing and implementing an organizational strategy, managing fundraising campaigns, and participating in all Board of Directors (BOD) positions.

After the Walden Consulting Capstone Program administration selection and vetting, my Walden DBA chair provided me with partner client information to make contact. Within the first week, I reached out to the client through the initial introductory phone call with participants and reviewed the purpose of the DBA consulting capstone agreement, client and student roles, the IRB guidelines, and service order agreement (SOA). Once the rules of engagement were understood, we set up a weekly phone call to discuss our backgrounds, areas of expertise, and expectations of the relationship. We developed the SOA, which outlined what the student and client mutually agreed upon concerning the discussion and interview schedule.

Research Method and Design

Research Method

I used the qualitative method to explore effective external communication strategies nonprofit leaders use to attract new donors to support the organization's social mission. Patton (2015) stated that researchers are more apt to choose qualitative methods when trying to exploit the socially constructed nature of reality through participants' experiences and the specific constraints that form the study. Additionally, Park and Park (2016) and Hong, Wei, and Xie (2016) claimed that solving a research problem using mathematical and statistical modeling is defined as quantitative research methodology and is used to emphasize measurement and examine relationships between variables to produce quantifiable results. The quantitative method was not appropriate for this study because there was a lack of variables necessary to produce quantifiable results.

Maxwell (2016) described that mixed methods researchers combine qualitative and quantitative research methods in the same study. Maxwell further explained the lack of quantifiable data precludes the use of mixed methods research methodology. Therefore, the mixed methods approach was not appropriate because the exploratory intent of this study was to gain insight into and understanding of what and how external communications are used to attract new donors.

Research Design

Researchers typically use case study, miniethnographic, and phenomenological qualitative research designs as a framework for data collection and analysis (Marshall & Rossman, 2016; Saunders et al., 2015). Researchers use a case study design to explore a particular situation and to test whether scientific theories and models work in real-world environments (Yin, 2018). I used a qualitative, single case study approach in this study and conducted an in-depth inquiry within a real-life context.

Amaechi and Fusch (2019) conducted a study on the existing barriers for women entrepreneurs, and they investigated a specific cultural phenomenon from multiple perspectives by combining an ethnographic design with a case study design, making it a miniethnography. The researchers explained that their combined design provided boundaries on time and space; however, the various methods used for collecting data covering all perspectives provided a challenge in understanding the phenomenon holistically (Amaechi & Fusch, 2019). Fusch, Fusch, and Ness (2017) stated that a miniethnographic design enabled researchers to use observation of a community to understand and ask questions in testing observations; however, Yin (2018) claimed a case study design might provide a more focused approach via semistructured interviews and data analysis to solve a business problem. In this study, I explored nonprofit SLs' effective communication strategies; therefore, a miniethnographic design was not a suitable research design for the study because I did not want to observe participants.

Researchers use a phenomenological research design to explore a phenomenon through peoples' individual experiences of an event (Dodgson, 2017; Saunders et al., 2015). Baraldi et al. (2016) asserted that the phenomenological design is focused on the elimination of researcher assumptions and preconceptions to understand the individual's conveyed experiences and responses to a situation. This study sought to investigate and explore successful strategies used by leaders of nonprofit organizations. According to Nazir (2016), phenomenological research questions aim to investigate a specific event with the intent to give meaning to the event through the individual's point-of-view; therefore, the phenomenological research design is not suitable for this study because I was not exploring a specific event.

For this study, I used the qualitative single case study design because, according to Yin (2018), single case studies describe the life experiences of participants by using a systematic and subjective approach to collecting rich data. Likewise, Fusch et al. (2017) argued that the case study design is an effective way to explore and understand a specific business problem. My use of the single case study design helped explore relationships and events that give meaning to the phenomenon of strategies used by leaders of nonprofit organizations.

Additionally, the qualitative study approach attempts to increase the researcher's understanding of an issue using various sources and data collection methods to add value and depth to the outcome of the study (Yin, 2018). Elsawah, Moallemi, and Ryan (2018) argued that exploratory research modeling may offer researchers efficient ways for understanding the boundary of the uncertainty and showed how the size of exploratory study influenced the cost and outcomes. The focus of this qualitative single case study was to explore effective external communications strategies using only semistructured interviews and the review of documents specific to the organization; therefore, the qualitative single case study design was appropriate.

The Walden DBA consulting capstone study is a partnership with a student scholar-consultant and one nonprofit organization, making a single case study design appropriate for this study (Walden University, 2019). Using the interview questions along with the 2019–2020 BPEP (2018) as a guide, I collected data through semistructured interviews with open-ended interview questions to ensure the participants were not influenced in any way while sharing information on and experiences of the phenomenon. Researchers use a semistructured interview technique that includes follow-up questions to refine and enrich the understanding and value of the interviewee's responses (Buckley & Doyle, 2017; Saldaña, 2016). Researchers have suggested data saturation in qualitative studies is a measure for when data collection and analysis is complete because the data is not revealing any new information or themes, and indicating the data quantity and quality meets all necessary standards (Amankwaa, Hancock, Mueller, & Revell, 2016; Buckley & Doyle, 2017). I conducted the interviews and asked follow-up questions until there was no new information to be gleaned from the participants.

Population and Sampling

The study participants consisted of a purposeful sample of three nonprofit SLs in southern California. Bastos et al. (2016) explained that the sample population must have been a part of the target population that is the center of the research question. I used a purposeful sample of three SLs for my qualitative single case study. Huang and Shi (2018) stated that using on-site participants is an efficient and cost-effective way to collect individual data. The nonprofit leaders chosen for this study met the protocol of the Walden DBA Consulting Capstone Program, and by using this purposeful sample of participants created an efficient and cost-effective for my research study. Walden University's (2019) DBA agreement dictated that the client provides three nonprofit senior leader participants for this study. The size of the sample allows a researcher to effectively cross-referencing source data to ensure the validity of the data using methodological triangulation (Gibson, 2017; Jordan, 2018). Gibson (2017) stated that methodological triangulation requires more than two sources where is it applied to the same phenomenon.

My data collection methods consisted of semistructured interviews with opened-ended questions and the data analysis of organizational documents, websites, and social media. All gathered data was considered equally during the analysis process. To ensure data saturation, Buckley and Doyle (2017) recommended the use of clarifying follow-up questions during interviews or clarifying information during weekly discussions. By this recommendation, clarifying questions were asked during interviews, and all data was considered equally during the analysis process. The Baldrige performance excellence framework (BPEP, 2018) and the associated criteria guided the interviews to capture a complete understanding of the organization's capability and capacity to increase revenue from the participant's viewpoint.

Additionally, the Baldrige organizational performance interview questions included the research study interview questions used for this study. All participant interviews complied with Walden DBA IRB requirements and conducted according to the SOA established during the initial discussions. The interviews were completed via the telephone and lasted between 40-70 minutes. I remained flexible and considerate of the participant's schedules and adjusted as needed and completed all interviews within the SOA set timeframe.

Ethical Research

I conducted this research study by Walden University research protocols. I received Walden University's IRB approval (No. 06-15-18-0747902) and the participant's informed consent before the start of data collection. Greenwood (2016) defined research protocols as the protection methods set in-place for research participants to ensure that researchers acknowledge the interests of the participants. A DBA Research Agreement was signed and served as the top-level service agreement between the client organization the Walden University. Walden University DBA Consulting Capstone administrators did not offer monetary incentives to the client for their role in this study; however, the client benefits included a scholar consultant to assist in improving the client organization's performance and social mission through the research conducted. The Walden University DBA Consulting Capstone administrators met with the client organization and described the terms of the partnership between Walden and the client organization before signing the DBA Research Agreement. Moreover, the terms of the DBA Research Agreement included procedures for withdrawal from the study.

My Walden University IRB approval included student researcher must receive informed consent from the participants; hence, all the participants reviewed and signed the Walden University informed consent form. Researchers must ensure ethical practices while conducting research and adhere to *The Belmont Report* ethical principles that guide human subject protections (Kara & Pickering, 2017; Patton, 2015; Taguchi, 2018). Allen and Wiles (2016) stated that researchers use pseudonyms to give participants anonymity. I removed identifying information from the interview transcripts and data collected to protect the identity of each participant. I used Participant A, B, and C as the pseudonyms for this study. The data and information collected for this study are stored in a secure office environment and will be kept for 5 years to ensure participant confidentiality. I will maintain the data and information obtained for this study and destroy it after 5 years.

Data Collection Instruments

I was the primary instrument for collecting information and data needed for this research study. According to Yin (2018), the researcher serves as the data collection instrument for qualitative case studies and gathers information using several techniques. The primary methods consist of (a) participating in the setting, (b) observing directly, (c) interviewing in-depth, and (d) analyzing documents (Yin, 2018). Through these techniques and my dedicated participation, the data collected consisted of materials specific to the organization, such as archival data, reports, and semistructured interviews.

The quality of the data collected through qualitative research is reliant on the skills of the researcher; consequently, if the researcher has a biased opinion, the data collected may be influenced to sway the outcome (Roth & von Unger, 2018). I used two techniques to collect data for this study, document analysis, and semistructured interviews. I gathered information from the SLs, by requesting website addresses, strategic planning documentation, financial statements, job descriptions, and other usable data sources recommended by the client. The documents were sent to me via *e-mail* or accessed through the website. The organizational information and reports were analyzed and reviewed to revealing facts and evidence to support the research topic.

The Baldrige performance excellence framework (BPEP, 2018) guided for the interview protocols developed and sent to the participant via *e-mail* before each scheduled interview. Taguchi (2018) found that semistructured interviews are used to explore participants' experiences, views, opinions, on the research topics. I conducted 24 semistructured interviews via the telephone with three research participants that were recorded and transcribed verbatim. Bengtsson (2016) proclaimed that the validity of the data is critical so that the researcher can make replicable and valid inferences regarding the data collected. Therefore, before concluding the interview sessions, I ensured that the participants shared what they intended to share by member checking, or directly reviewing the data they supplied, to ensure accuracy in what they intended to communicate. Then, before data analysis, I sent the data transcripts and summaries write-ups to the participants via *e-mail* for review to check for accuracy a quality account of the participant's experiences and ensure reliability validity of the data collection instrument. The participants provided a positive response via *e-mail, accepting* the data as accurate as a form of transcript review.

Data Collection Technique

Two data collection techniques were used to collect data for this qualitative single case study: organization document analysis and semistructured interviews. Before data collection, I submitted a Form A and received Walden University IRB approval. Kara and Pickering (2017) believed that the intent of the data collection technique for qualitative research is to reveal evidence of an individual's thoughts and actions. Roth and von Unger (2018) explained that using a repeated standard process for data collection enables the efficient evaluation of the data. The established interview protocol developed for this study aided in the interview process, collection of documents, and gaining access to information from the participants to include website addresses, strategic planning documentation, financial statements, job descriptions, and other usable data sources recommended by the client via *e-mail* and weekly discussions. I obtained the documents using *e-mail* channels or accessed through the organization's website. Buckley and Doyle (2017) found that separate security or oversight procedures assist in avoiding ethical violations with participant data.

While reviewing and analyzing the interview data, reports, and website data, I assured the security of the participant data. Researchers can keep data secure by stored in fireproof safes or secure building using a system of passwords so that access to data is restricted (Kara & Pickering, 2017; Marshall & Rossman, 2016). I transcribed the interview audio files on electronic media and used a reflective journal for all notes, specifically dedicated to the study. Then, I saved all records, audio files, and electronic documents to a secure computer both encrypted and loaded with antivirus software in my home office. I organized the information collected by the categories of (a) leadership strategy, (b) customers, (c) measurement, (d) analysis and knowledge management, (e) workforce, (f) operations, and (g) results to assist in identifying themes.

I used both member checking and transcript review as valid qualitative techniques. To establish trustworthiness with the reader and as a means to honor the participants, the researcher must ensure correct interpretation of the data and that the truth of what the participants intended to share was expressed (Leung, 2015; Marshall & Rossman, 2016; McIntosh & Savage, 2017). Birt, Scott, Cavers, Campbell, and Walter (2016) argued that giving participants a summary of the finding for member checking ensure the results accurate and honest and resonate with their experience. Additionally, Bengtsson (2016) explained that sharing the transcripts provides the participant the chance to review the response, add more information, and to edit if necessary, to verify the accuracy of the data. I chose member checking to assure the participants that researcher bias is not present and validate the data collected.

There are advantages and disadvantages of using interviews and document analysis techniques for qualitative research data collection. According to Manzano (2016), interviews allow researchers to ask participants more in-depth questions to reveal the personal feelings, perceptions, and opinions of a phenomenon. However, Buckley and Doyle (2017) claimed the interviewer must be highly skilled to prevent data loss. Another method of data collection is document analysis. Clark and Vealé (2018) contended that reviewing items such as public records, personal documents, and physical evidence and allows researchers to interpret the data to give voice and meaning around a topic. Yin's (2018) viewed corresponds with this argument that document analysis is an efficient and effective data collection technique because documents are manageable and practical resources; however, Yin argued analyzing reports and information does not allow the researcher to evaluate user opinions, needs, or satisfaction. Understanding the opposing views to one method over the other, the two methods of data collection used for this study are invaluable components of my research and enabled methodological triangulation to confirm credibility.

Data Organization Techniques

The Baldrige Performance Excellence Framework (BPEP, 2018) was the guide used for this study and provided structure to select and organize the data I collect from interviews and document analysis. According to Badham et al. (2017), it is essential to accurately organize and document all research sources and data to aid in accessing and understanding the data. Additionally, Nico (2017) asserted a logical organization of the materials with the use of a research log to describe to help isolate and clarify the data gives credence to the quality of a study. The current technology and processes that were selected to aid in this study enable accurate and timely collection and analysis of data.

Using NVivo software added to my ability to identify emerging themes, as recommended by Yin (2018). I organized the information using my researcher's log and according to the Baldrige performance excellence framework (BPEP, 2018) categories of (a) leadership; (b) strategy; (c) customers; (d) workforce; (e) operations; and (f) measure, analysis, and knowledge management. As suggested by Belotto (2018) and Saldaña (2016), the interview transcripts were organized, coded, and interpreted with the use of NVivo software. The use of pseudonyms assured privacy for all participant data collected. McSween-Cadieux and Turcotte-Tremblay (2018) discussed current methods such as a computer security method such as a password to secure and protect participants' data. The computer with the data collected, my reflective journal, and a secure password-protected computer equipped with antivirus software in my home office hold the data collected for this study. The electronic data deleted, and any paper data shredded after 5 years.

Data Analysis

The key to qualitative research is for the researcher to be able to view the phenomena from the participant's perspectives, interpret the data, and to integrate existing theory to identify themes to report the findings accurately (Belotto, 2018; Morse, 2015; Nico, 2017). Methodological triangulation was be used for coding data and introducing themes. I used the REV call recorder application (APP) to record the interviews and edit the recordings to remove all personal identification associated with the participant's files before submission to professional transcription service. The REV application transcribed files and *e-mailed* them to me, I conducted a thorough review of the transcripts, construct a summary of the data, and send the transcripts and overview to the participants through *e-mail* for member checking and data validation. In qualitative research, researchers use triangulation techniques, such as method triangulation, investigator triangulation, theory triangulation, and data source triangulation to compare concurrently collected qualitative findings (Badham et al., 2017; Belotto, 2018; Saldaña, 2016; Yin, 2016). The data was analyzed manually using methodological triangulation to code all the received data and find themes across the sources of data for interpretation.

The data collected aligned with my research question: What effective external communication strategies do nonprofit leaders use to attract new donors? Furthermore, the data collected assisted in assessing the client's organizational performance. As recommended by Belotto (2018) and Bright, Heesen, and Zucker (2016), coding was used to identify topics, issues, similarities, and discord among participants as they are related to my research question. The data analysis for this study included determining meaningful themes, patterns, and descriptions that answer the research questions. I used Yin's (2016) five-step process for handling data comprised of: (a) compiling, (b) disassembling, (c) reassembling, (d) interpreting the meaning, and (e) concluding. Castillo-Montoya (2016) asserted that interview transcripts, company websites, and documentation, analyzed numerous times can capture all the emerging themes. I used NVivo 10 to import, compile, and organize the data and begin the process of reassembling the data. The reassembling analysis process constitutes a restructuring of the data that aligns data under categories and arrangements until emerging themes are satisfactory. Last, I interpreted the meaning of the data with the use of NVivo software.

Reliability and Validity

The researcher's role in qualitative research is to ensure that the research problem, design, methods, and resulting evidence are ethical, aligned, safeguarded from bias, and focused on a relevant topic that contributed to the knowledge and advancement of the reader (Marshall & Rossman, 2016). According to Saldaña (2016), quality research must stand-up to the scrutiny of reliability and validity in quantitative research and the critical components for evaluating trustworthy qualitative research are dependability and credibility. Dependability is ensuring the consistency of the data analysis, that the research design and methods produced reliable results (Saunders et al., 2015). Assuring credibility is associated with the data collection sources and thorough, unbiased analysis and strategies to confirm the information and ensure the trustworthiness of a DBA research study for useable results.

Reliability

To avoid dependability issues, as suggested by Saldaña (2016), I used the transcript review technique. I sent the interview transcripts and summary of the transcripts to participants for verification, correction, and comments as a method to confirm the information and to obtain useable results. Baraldi et al. (2016) claimed that when conducting a business research study, a researcher aims to inform and advance the knowledge of leaders to guide decisions. Moreover, a researcher's goal is to provide trustworthy results by allowing participants to member check their answers (i.e., verify what they shared during the interview at the time of the interview) to assure that the researcher correctly understood what the participant intended to share (Marshall & Rossman, 2016; McIntosh & Savage, 2017). Member checking was a means to establish trustworthiness and credibility (Baraldi et al., 2016). The criteria for dependability are the researcher annotating all changes throughout the research cycle to ensure reliable results (Casey, Houghton, Murphy, & Shaw, 2013; FitzPatrick, 2019; Jordan, 2018). To ensure the dependability of my research, I recorded the participant's interview responses and analyzed the data without systematic or researcher bias. Comparing data to confirm the accuracy of gathered information from multiple sources provides proof and verification of findings. To improved reader confidence in the credibility of the results, there must be consistency in the data gathered (Jordan, 2018). Additionally, to assure reliability, I used methodological triangulation and cross-referenced several data sources such as interviews, organizational documents, and website information to study the phenomenon outlined in the research question to confirm data and to ensure data are complete.

Validity

Researchers use validation techniques in qualitative research studies to confirm the accuracy and truthfulness of the research data. The aspects of validation include confirmation of data, transferability of the data, and assurance of achieving data saturation (Casey et al., 2013; Leung, 2015; McIntosh & Savage, 2017). I used methodological triangulation, member checking, and the use of a consistent interview protocol to confirm the neutrality and accuracy of the data collected. Additionally, validation assesses the accuracy of an instrument to ensure the data collected is credible, the results of a study can be generalized from the sample to a population, and the tool accurately achieves the researcher’s objectives (Clark & Vealé, 2018). For this qualitative study, I validated the research instrument and data collected using member checking and methodological triangulation to develop credibility and trustworthiness for the reader.

Credibility. Researchers must validate that the sources used for data collection are credible to make convincing arguments. The source must be unbiased and have authority in the field via a degree or experience and the data collected should connect to the topic, be current, and purposeful to relate to a specific area to assure credibility (Madill & Sullivan, 2017). I ensured reliability by using both member checking and transcript review to convince the reader I correctly interpreted the data and that the truth of what the participants intended to share was what they shared, as recommended by Leung (2015) and Marshall and Rossman (2016).

Transferability. Transferability refers to the study findings being applicable in other situations and in like environments while maintaining the meanings and inferences gather from the completed study (Hong et al., 2016; Yin, 2016). Transferability is the responsibility of the researcher (Clark & Vealé, 2018). To show transferability to the reader, I thoroughly described the research context, setting, and happenings and inferred how the findings may be used in similar circumstances to bring clarity to a phenomenon.

Confirmability. Confirmability reveals trust in the data collection and analysis of a research study. In qualitative research, confirmability refers to the level at which the results could be confirmed or corroborated by others (Moser & Korstjens, 2018). Ellis (2019) argued that confirmability is the last criteria for honesty and gives confidence to the reader. The strategies I used to enhance confirmability are consistent interview protocols, methodological triangulation, and the incorporation of member checking with participants to verify data understanding. To achieve confirmability, I planned to consistently monitor and compare the data gathered from the interview transcripts, organizational documentation, and websites to verify and annotate source alignment, conformity, and differences. As the researcher, I actively searched for, described, and documented any contradictions found among the data sources.

Data saturation. With the use of a consistent interview protocol process, I achieved data saturation. Fusch and Ness (2015) asserted content validity and the failure to achieve data saturation negatively impacts the quality of the research. The researcher achieved data saturation when the review of the data collected does not reveal new themes or data, and the research purpose can be achieved with the data collected (Cypress, 2017; Fusch & Ness, 2015; Hong et al., 2016). I reached data saturation for this study by using follow-up and clarifying questions (member checking) during the interviews and by reviewing all interview transcripts thoroughly. Furthermore, I conducted an in-depth, comprehensive review of all the data collected from the notes taken in my reflective journal, and all other documents, many times until no new themes emerge to reach data saturation.

Transition and Summary

The purpose of this qualitative single case study was to explore effective external communication strategies used by nonprofit leaders to attract new donors. The previous section discussion focused on the purpose of the research and how bias to mitigate in my role as the researcher is through introspection of personal experiences. The topics covering the research methodology included the design of the research, the sample size, who provided the data, and the use of specific analysis techniques were presented to provide insight and legitimacy to the plan in answering the research question while protecting the participants of the study. I was able to validate the procedures for obtaining the data and how the data was understood and interpreted. Furthermore, ethical research, reliability, and validity were explained to ensure the protection of the participants and to warrant the completion of a reliable qualitative study. In conducting this study, the results have the potential to promote positive change by giving nonprofit leaders the understanding and knowledge needed to develop effective external communication strategies to attract and influence new donor support.

Throughout Section 3, I explain the results of my research findings and begin with the client organization's organizational profile. Following the organization's story, this section covers a detailed analysis of the data collected in the Baldrige Excellence Framework (BPEP, 2018) categories. Then, the results of the study are outlined based on strengths and weaknesses in the areas of process results, and performance results. Last, in this section, a summary of the project is provided and researcher recommendations for future research.

Section 3: Organizational Profile

Founded in 1982 by physicians, parents, volunteers, and community leaders, Foundation X (a pseudonym) is a single, nonprofit, small- to medium-sized enterprise (SME) located in southern California. The leaders established this nonprofit SME to help raise funds for pediatric cancer research institutions and physician researchers working toward discovering lifesaving treatments to improve the care, quality of life, and survival rate of children with malignant diseases. Foundation X works with a community of volunteers to organize various funding campaigns to gather donations from individuals, families, and corporations. The current leaders of Foundation X have previously held multiple positions in nonprofit organizations, including directing, managing, and participating as a senior board member. These individuals have extensive experience working with physicians, researchers, volunteers, staff, and community partners to coordinate and process the funding raised for selected research (see Figure 1). The prime beneficiaries of the Foundation X research funds are researchers and institutions applying for grants to conduct research. A highly skilled research selection team, supported and advocated for by the Foundation X leadership, critically analyzes and selects grant applicants. However, the ultimate beneficiaries of Foundation X are the children and families suffering from the effects of living with cancer. Since its inception, Foundation X has raised over $42 million for cancer research. In recent years, the competition for donor support between nonprofit establishments has increased, resulting in a threat to the foundations funding stability.

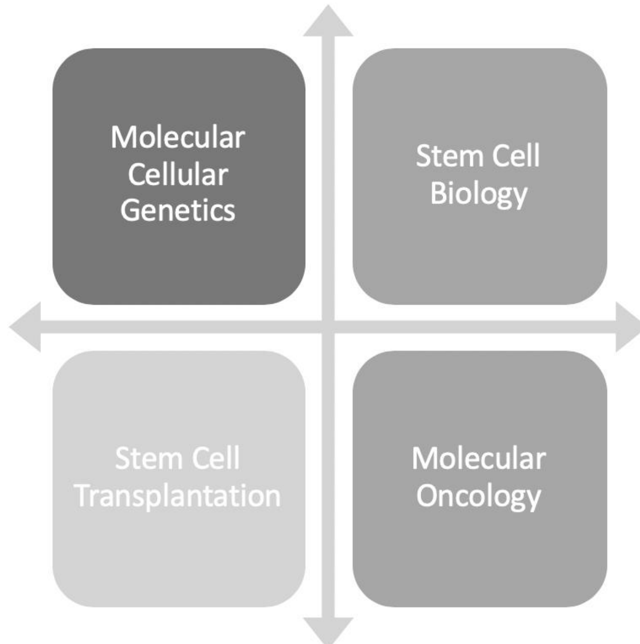


Figure 1. Types of research funded by the client organization. This figure illustrates the research projects for which Foundation X raises funds.

Foundation X leaders consider the most significant strategic challenge for their organization to be the ability to devise unique ways of communication to reach and attract new donors to meet their funding objectives. Currently, Foundation X offers potential donors many avenues to support the organization, such as volunteering time, attending events, donating money, and participating in outreach campaigns. This small workforce of leaders, staff, board members, and volunteers facilitate various campaigns that include interaction and collaboration with individuals, families, and local organizations to build relationships and partnerships with businesses in the community. The foundation’s campaigns attain adequate funding sources and fulfill funding objectives most of the time; however, external communication methods to attract new sponsorship would make it possible to ensure Foundation X ’s funding stability and, therefore, guarantee growth.

The purpose of this DBA consulting capstone study was to perform comprehensive analysis and research to assist Foundation X in improving key work processes, identifying and mitigating strategic challenges, and recommending improvements for overall performance. In collaboration with Foundation X, I determined that the specific research problem for the foundation was their desire to increase their ability to attract new donors; therefore, this qualitative single case study was conducted to explore effective external communication strategies Foundation X’s SLs currently use to attract new donors and develop additional strategies to strengthen their ability to attract new donors. I obtained the data for this study from semistructured, open-ended, telephone interviews with three SLs of Foundation X organization and the findings from document analysis. I formulated the interview questions to both address the Baldrige Excellence Framework criteria and answer the central research question.

The first component included in the design of the interview questions was the Baldrige Excellence Framework (BPEP, 2018) criteria, which included questions related to leadership strategies, customers, workforce members, operations, and results. The second component was related to the central research question for this study, which was: What effective external communication strategies did nonprofit senior leaders use to attract new donors? Once developed, I asked the interview questions of the participants in semistructured, telephone interviews.

After the completion of the interview process, I coded the participant responses to identify themes within them. In the results strengths, the data indicated cost control methods assist in showing new donors discipline in spending and transparency, while the theme regarding results opportunity included the insertion of business development strategies to improve the ability to attract new donors. Analysis of the data further indicated that all participants agreed that a plan to add external communications strategies to the overall strategic planning effort would be useful in attracting new donors. Therefore, for Foundation X to continue to attain their mission and maintain organizational success, effective external communications strategies must be thoughtfully developed and implemented. Furthermore, all participant responses aligned with my analysis of previous literature and the IMC conceptual framework regarding the need for nonprofits to have a scalable, consistent, and targeted external communication strategy to attract new donors.

Key Factors Worksheet

Organizational Description

Foundation X is a 501(c)(3) nonprofit organization with a national presence located in southern California. Foundation X has constituents across the country who raise awareness; promote a far-reaching message; and ensure maximum exposure to all potential donors, families, institutions, researchers, and health professionals across the nation. To ensure the funding of the most critical research, Foundation X leaders work directly with researchers and health professionals to identify the specific challenges the cancer research community faces. According to the Pediatric Cancer Research

Foundation (2019), there are 10,270 children diagnosed with cancer each day in the United States, and each year the dedicated Foundation X leaders raise funds necessary to support advancement in the fight against childhood cancer.

The Foundation X SLs exhibit dedication to the community they serve through showcasing the personal stories of children with cancer through various channels to raise funds for future research and survivorship. Highlighting individual struggles and achievements through the sharing of families' accounts of their battle creates awareness, arouses both empathy and sympathy, and accentuates the need for a cure. Beginning in 2017, Foundation X leaders became inspired to fulfill an emerging need to support the quality of life initiatives for childhood cancer survivors. Creating a focus on survivorship, Foundation X established a college scholarship program to assist survivors and families who incurred devastating medical costs to give them hope for a promising future. The Foundation X leaders, board members, and workforce are embracing the challenge to increase growth and are committed to strategically positioning the organization to better support the community it serves.

Organizational environment.

Product offerings. The leading product Foundation X offers is grants, which provide funds for research institutions, physicians, and health professionals to develop innovative ways to treat and cure cancer, thereby, improving the care, quality of life, and survival rate of children with cancer. Additionally, in 2017, Foundation X introduced a secondary product offering that included an annual scholarship award for childhood cancer survivors. Foundation X leaders manage the rigorous grant proposal cycle and award process with the support of experienced and skilled professionals identified by a leading professional organization. The Foundation X leaders facilitate and support the following four types of grants awarded: (a) basic research science, (b) translational research, (c) emerging investigator fellowship, and (d) a designated grant program. Once applicants submit their research proposals, the BOD advisory committee scrutinizes the grant proposals to determine the research category. Additionally, an outside scientific review panel evaluates each project for the quality of research and makes recommendations to the BOD Scientific Advisory committee.

Since 1982, Foundation X has funded vital pediatric cancer research and successfully contributed to the increased survival rates for childhood cancer. Foundation X leaders stated that the cancer death rate in children has decreased at a faster rate than any other age group; however, rare and aggressive cancers continue to emerge, devastating the lives of many families. This statement aligns with research from the American Cancer Society (2019), which stated that although cancer is the second leading cause of childhood death in the United States and that cancer incidents in children have been increasing by 7% each year since 1975, the death rates continue to decline and survival rates to increase. As such, the Foundation X product offering provides researchers the funding to get ahead of this destructive disease by cultivating advancements that identify the causes of the disease and develop strategies for cancer prevention, diagnosis, treatment, and a cure, thereby contributing to increasing survival rates.

The delivery mechanism used to support Foundation X's mission is the proposal process, which grants the funds to the selected researchers and institutions as well as to fund scholarships for survivors. To ensure there are funds for delivery, Foundation X leaders and their committed workforce generate the revenue needed to fulfill the organization's social mission through a hands-on approach to fundraising. The leaders of Foundation X facilitate various fundraising campaigns, such as community events, direct mailings, website donations, and relationship management with private and family donors. The research grant proposals are submitted and processed through a rigorous grant proposal cycle and award process on a strict timeline, including the deadlines related to proposal application submissions, proposal reviews, recipient selection, grant distribution, and research compliance support.

Mission, vision, and values. Foundation X's core competency is to raise the necessary funding to offer grants to research institutions, researchers, and health professionals to explore and discover new treatments, protocols, and interventions as well cures for all childhood cancers. Foundation X's core competency supports and aligns with the organization's mission to find the latest innovative lifesaving treatments and cures for childhood cancers (see Figure 2). Foundation X's organizational values center on giving every child a cancer-free future. Their core competency supports this goal by actively raising funds for research grants. The commitment of Foundation X's leadership to the mission, values, and ethical behaviors motivate their workforce and ensure the successful accomplishment of their core competency.

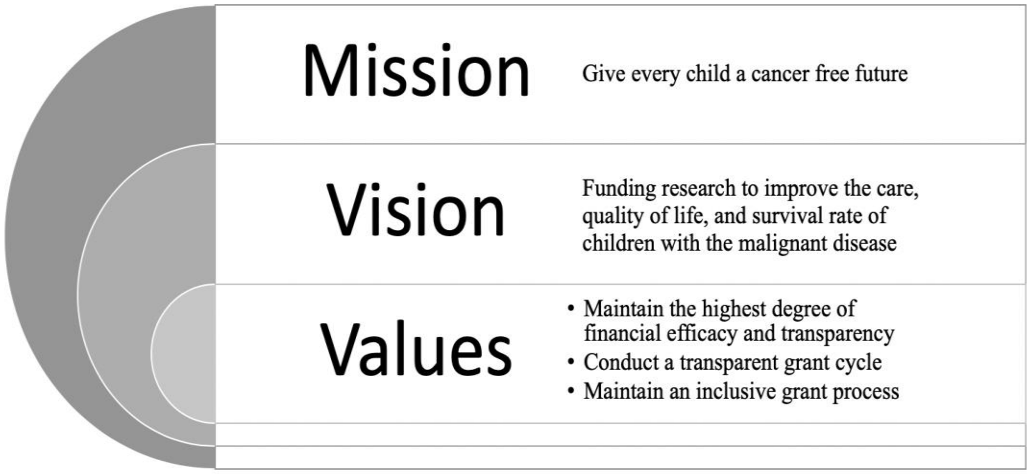


Figure 2. Mission, vision, and values statements. This figure identifies Foundation X's mission, vision, and values.

Workforce profile. Foundation X's workforce structure consists of three components: (a) 19 members on the BOD, (b) eight, paid, full- and part-time staff members, and (c) 30–40 volunteers (see Table 2). The BOD is a governing body that has bylaws and acts as an advisory council for the direction of the organization. The BOD relies on the executive director (ED) to manage the workforce. The ED reports directly to the BOD and is responsible for all the organization's staff and operations. The ED holds a bachelor's degree and has 25 years of experience in leadership positions of nonprofit organizations. Foundation X has mandatory education requirements for specific positions; however, progressive professional experience is essential for each job and on a case-by-case basis, can be a substitute for the degree requirements. Within Foundation X, 60% of the staff provides administrative support for the grant proposal cycle and award processes, and 40% of the team provides support for fundraising campaigns.

Table 2

Workforce Profile

Leadership: 19 members on the board of directors and executive director					
Staff: 8					
Volunteers: 30-40					
Staff job title	# of positions	Part time (PT)/Full time (FT)	Education required	Experience required	Criminal background check
Executive director	1	FT	Yes	Met 100%	Met 100%
Office manager/event support	1	FT	Yes	Met 100%	Met 100%
Chief finance manager	1	PT	Yes	Met 100%	Met 100%
Philanthropy manager	1	FT	Yes	Met 100%	Met 100%
Social media & marketing manager	1	FT	Yes	Met 100%	Met 100%
Development associate East Coast	1	PT	Yes	Met 100%	Met 100%
director of special events West Coast	1	FT	Yes	Met 100%	Met 100%
corporate relations	1	PT	Yes	Met 100%	Met 100%
Key volunteers: ~30–40					
Various positions		Not Required?	Not Required?	Met 100%	Met 100%

The motivation behind Foundation X’s workforce is the organization’s mission and commitment to producing tangible research results for children and families dealing with pediatric cancer. The foundation's SLs' passion for fulfilling the mission, engaging with the team, and growing the organization motivates the workforce to achieve the mission, vision, and values (MVV). The current ED was hired in 2010 and introduced new strategic concepts to the BOD for approval to revise Foundation X's strategies and goals to focus on increasing their product offerings, improving fundraising strategies, optimizing campaign management, and instituting sound financial processes. Based on the new focus and objectives, the workforce is striving to reach a goal of 20% of the staff providing administrative support for the grant proposal cycle and award processes and 80% of the team providing support for fundraising campaigns. The SLs of Foundation X are seeking to align the organization with the revised strategic goals, and the nonprofit foundation does not have any organized bargaining units. Additionally, Foundation X SLs ensure the health and safety of their workforce by requiring all potential staff members and volunteers to pass a criminal background check before considering them for employment or volunteer support as well as developing organizational policies for health and safety requirements.

Assets. Foundation X's assets are the experienced BOD, staff, and workforce of committed volunteers and families. Foundation X does not own any facilities, but they do maintain a 5-year lease for open office space required for the workforce. To perform their work-related tasks, each member of the Foundation X paid workforce has a personal work area and computer workstation. The foundation's senior leadership staff and principal employees also have additional computers for home use when it is not feasible for them to get to the office. Each member of the paid workforce has an assigned mobile laptop they can use while traveling or working at fundraising events. Foundation X uses the revenue to purchase the lease for the office space, equipment, and necessary technologies.

Regulatory requirements. Foundation X is an IRS compliant licensed 501(c)(3) tax-exempt nonprofit organization. Foundation X SLs and their workforce adhere to all the required rules and regulations of the IRS, including filing all annual financial reporting requirements, such as the IRS Form 990, accurately and on-time. Foundation X SLs and staff comply with yearly audits and ensure internal reporting meets federal, state, and local laws. The BOD adheres to and follows all required bylaws and staff leaders ensure the workforce and volunteers follow written policies, requirements, and ethical values of the nonprofit organization. Furthermore, Foundation X SLs have provided the required documentation to gain accreditation from the Better Business Bureau (BBB). To ensure transparency of the organization, Foundation X participates in Charity Navigator and GuideStar information services, which specialize in reporting on U.S. nonprofit companies.

Organizational relationships.

Organizational structure. Foundation X is a 501(c)(3) nonprofit organization with an organizational structure and governance system organized as a corporation in the state of California. Foundation X does not have a parent organization or any subsidiary organizations. The BOD has 19 members who act as an advisory council and provide oversight of the organization’s financials, HR, taxes, and audits. The BOD has an executive committee composed of various officers, including the president, vice president, treasurer, director of scientific affairs, director of public relations, and a past president. The ED is responsible for Foundation X's strategy execution, day-to-day operations, the workforce, and the volunteers. The ED informs and reports to the BOD when they assemble as an entire group; however, according to the participating SLs, when the board acts individually on behalf of the BOD, or as a single committee, those individuals and committees report to the ED.

Customers and stakeholders. Foundation X identified children and families dealing with pediatric cancer and the research institutions, researchers, and health professionals applying for grants as the key customers of their product offerings. The research institutions, researchers, and health professionals applying for grants must follow a strict proposal process and conduct quality research that yields positive results toward the MVV established by the SLs of Foundation X. The key stakeholders of Foundation X are the workforce, volunteers, and donors who support fundraising and provide monetary donations for an active grant program. The key stakeholders are not only committed to fundraising and donating funds for Foundation X, but also promote public awareness by sharing the message of Foundation X's MVV to gain support and increase the financial capacity of the organization. The key customers and stakeholders are devoted to Foundation X's vision of finding a cure for childhood cancer.

Suppliers, partners, and collaborators. Foundation X suppliers and partners are essential to both fulfilling and continuing the mission, as well as continuing organizational growth (Table 3). According to the participating SLs, there are two suppliers for Foundation X: research-suppliers and donors-suppliers. Foundation X donor-suppliers are the donors supplying the funds for the research grants, while the research-suppliers are the institutions, researchers, and health professionals conducting the research and discovering cures and new ways to fight pediatric cancer. Foundation X partners are volunteers, large family foundations, and board members that the organization recognizes through special events throughout the year. Additionally, other nonprofit organizations and collaborators become partners when they join Foundations X's efforts to conduct joint fundraising campaigns to help support the community.

The Foundation X volunteer committee consists of trusted members and long-term supporters of the organization entrusted with managing and operating the fundraising campaigns. Additionally, the volunteers manage some day-to-day work tasks, such as collaborative design and the delivery of invitations for events. Many of the volunteers are familiar with the organization's activities and contribute to event growth through their outreach capabilities. The coordination with stakeholders requires an effective communication strategy to ensure all information is disseminating and feedback is generated for successful operations. Brinzea et al. (2016) asserted effective external communication enables stakeholders to understand the needs of an organization.

Communication with stakeholders is vital to the organization's survival. The key delivery mechanisms of Foundation X's product offerings are communication with suppliers, partners, and collaborators, which occurs through personal e-*mail*s the organization's website, appeals to the community, and feedback from both customers and stakeholders (Table 3). The SLs of the foundation conduct business through personal telephone calls and e-*mail* communications. The Foundation X website informs the public about the organization’s MVV, proposal and grant processes, fundraising events, and success stories, as well as providing an avenue for individuals to submit donations. Foundation X conducts appeals both midyear and at year-end, which offers an opportunity for individuals and families to share their stories and give feedback to Foundation X SLs. Furthermore, Foundation X conducts online or face-to-face surveys after every fundraising event to solicit specific feedback for future improvements. Foundation X SLs are dedicated to communication with suppliers, partners, and collaborators to provide the stakeholder community with a continuous feedback loop to ensure the client is meeting the needs of the community and that new ideas are flowing into the organization for innovation and constant improvement.

Table 3

Key Suppliers, Partners, and Collaborators

	Suppliers, Partners, and Collaborators	Influence in Organization	Influence in Competitive
Suppliers	Donors	Provide funding for grants	Drives creativity and strategy to reach donors
	Researchers	Advances the fight against cancer	State-of-the art research
Partners	Family foundations and volunteers	Provide support for fundraising and campaigns	Provides new ideas and Support for funding Raising activities
Collaborators	Other local nonprofit organizations and volunteers	Mentorship and partnership opportunities	Provides insight to current trends, tools, and new ideas

Organizational Situation.

Competitive environment.

Competitive position. The landscape of nonprofit organizations raising money for pediatric cancer research is growing, and competition is increasing. Foundation X is 1 of 5 charities in the local area that raises money for pediatric cancer research. However, Foundation X is the only one in the area that solely raises money for grants to fund pediatric cancer research. In comparison, Foundation X's local competitors raise money for program services to give respite to the parents of pediatric cancer patients. The SL's knowledge and awareness of the regional competition may provide insight to understanding their unique capability and how critical Foundation X is to the community, thereby creating a competitive edge through the use effective fundraising processes, strict budget control, and a consistent grant award process to sustain the mission.

Competitiveness changes. Foundation X must grow and evolve to stay competitive in the nonprofit sector; therefore, the senior leadership is refocusing the organization to attract more significant corporate donations by allowing these corporate donors to donate to a specific type of research. Foundation X is doing this through education, empowerment, and changing strategies designed to evolve them from a grassroots organization toward a small business mindset. The SLs are searching for ways to improve and integrate communication strategies to ensure the touchpoints are relevant and that messages are integrated and consistent as they strive to connect with potential donors. Regarding these strategies, Participant A explained that raising money for research is a business development conversation and that the SLs must communicate the value of the organization’s MVV to increase corporate donations. These strategies align with the IMC, a significant component of which is creating brand authenticity. According to Akbar and Wymer (2017), using IMC strategies in which business leaders focus on developing a recognizable and consistent message will thereby increase awareness and advocacy.

Comparative data. To remain competitive, understanding the organization's profile and standing in the market is essential, but acknowledging the competitors’ profile, strengths, and weaknesses could be vital to survival. Foundation X SLs collect comparative data from within the nonprofit sector about competitors via company websites, as well as the Charity Navigator, and GuideStar websites, to see information related to their latest events and campaigns, expenditures, salaries, and grant distribution totals. Additionally, the SLs gather external data from (a) the National Institute of Health, (b) the Center for Disease Control, (c) private nonprofit data sources accessed by invite-only organizations where children’s hospitals submit and get information, and (d) Gallup polls that share information about the research institutions funded by the organization. Foundation X SLs revealed using the comparative data assists the foundation in assessing current processes and trends in the marketplace. Additionally, participant A emphasized that Foundation X does not use this data to educate or guide parents toward research institutions, cancer treatments, or physicians. Although there may be limitations within these data sources, comparative data was instrumental in keeping up on current trends and discovering new ways to remain relevant in the nonprofit sector.

Strategic context. Foundation X’s current advantages and strategic challenges are related to the rapid growth the company is currently experiencing (Table 4). The benefits arise from partnerships, innovations, and reputations promoting growth and leading to a positive sign of business success. However, maintaining a large enough workforce to manage the programs and conduct events is a concern to the organization's SLs. Additionally, the SLs reported struggling with the best way to grow and hire staff, as well as where to make investments while staying within the foundation's overhead ratio goal of 20%. The SLs do not consider investments in technology and software as a critical need, but rather understand investments in technology and software offer the most significant return on investment (ROI), yet find it difficult to invest in technology while remaining within the confines of the foundations established goal of 20% revenue allotment for general administrative and operating costs. Another challenge the organization faces is that the SLs are overtasked with supporting the growing organization and there is little time for strategic planning and even less time and resources allotted for the execution of meeting the strategic objectives necessary to be successful. Establishing formal organizational management processes may provide the opportunity to establish the needed organizational stability and agility to adapt to rapid changes.

Table 4

Foundation *X Strategic Content*

Area	Key strategic advantages
Program and services	Volunteers, partners, families, donors, community
Operations	Volunteers, employees, BOD, leadership
Workforce	skilled and commitment
Area	**Key strategic challenges**
Program and services	Attracting new donors
Operations	Limited resources
Workforce	Lack of funding to support growth

Performance improvement system. Foundation X SLs stated the management of performance occurs through workforce evaluations, informal interactions, and annual feedback sessions. However, there are no formal policies and procedures that provide the senior leadership and workforce with appropriate administrative guidelines for implementing formal disciplinary action, or administrative materials including disciplinary documentation forms. Foundation X's performance improvement efforts begin with the workforces, mid-year annual assessment, and performance reviews. Part of this process involves the SLs working with each staff member to set goals and develop key performance initiatives for the following year. The Foundation X SLs conveyed that in the past there has been no need to discipline the workforce or take steps necessary to improve performance.

Although, performance improvement is a goal for most businesses, what is unique to a nonprofit organization is that the workforce is passionate about and motivated by the mission and are acutely aware of and understand the repercussions to the social cause they support when they do not perform. The participating SLs indicated the foundation's performance improvement system is appropriate for their unique workforce; however, if the senior leadership decides to formalize and create policy communications, they can implement the changes through training that will provide organizational understanding and support for the new policy, as well as assist the senior leadership in monitoring the progress of the program.

Additionally, during the BOD annual strategic planning retreat, there is informal discussion regarding the organization's performance and performance improvement. During the retreat, the BOD and ED meet to discuss performance improvement, organizational projects and processes, finances, staffing, donor engagement, and review the IRS form 990 results. The Foundation X strategic planning retreat provides the workforce with the opportunity to give feedback, give advice, and input on ways to improve the organization.

Leadership Triad: Leadership, Strategy, and Customers

The 2019-2020 Baldrige Excellence Framework (BPEP, 2018) was the tool used to identify the senior leadership's ability to set the vision and direction of the organization by making strategic decisions and plans. The leaders establish the organizational structure, influence people and systems, and lead the focus on customers and product or process design. Use of the Baldrige Excellence Framework allows researchers to use the leadership triad as a combination of three criteria: (a) leadership, (b) strategy, and (c) customers. Leaders must have a meaningful impact and achieve essential results by ensuring every level of the organization understands the importance of the customer and enable employees to make decisions to that best support the customer (BPEP, 2018). Leadership focus is essential to the results of organizational processes.

Leadership

Senior leadership. Foundation X's senior leadership consists of the ED, key managers, and the BOD. Foundation X achieves its vision and values by exhibiting high ethical standards, conducting principled fundraising campaigns, and maintaining professional and transparent business practices (Figure 3). According to Foundation X SLs, the mission statement encompasses the vision and values of the organization to improve the care, quality of life, and survival in children with cancer. Their view of a world without pediatric cancer does not change but allows some adaptability regarding the accomplishment of the mission. The foundation's SLs work with the ED to help guide the BOD in strategic planning during the annual BOD strategic retreat and through updating or changing the MVV of the organization. The purpose of the BOD's strategic yearly retreat is to have the members step-away from the regular business to focus on the organization's strategy. The process begins with the ED, who initiates and facilitates a preboard strategic retreat meeting with the foundation's leaders and key managers to review the current state of the organization. Then, the staff considers and plans new goals for the upcoming year, sets objectives, and outlines actions needed to reach the target goals, which results in the drafting of a strategic plan that aligns with an annual budget. Then during the BOD strategic retreat, the parties present review, negotiate, and approve the budget for action.

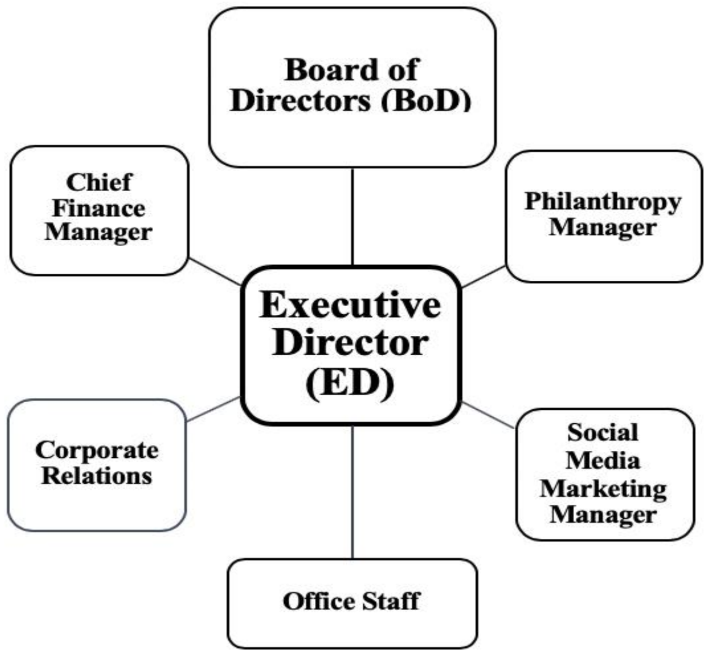


Figure 3. Client organizational structure. This figure illustrates Foundation X's senior leadership.

The vast knowledge and experience of the board members allows the BOD to set the tone for legal and ethical behaviors of the organization by guiding and conveying legal requirements to Foundation X. The Foundation X SLs and BOD demonstrate their commitment to legal and ethical practices through personal example and the creation of a consistent dialog during a weekly staff meeting and monthly BOD meetings with their ethically compliant team. For instance, one Foundation X scholarship awardee failed to meet the return criteria necessary for the second year of the scholarship, resulting in the termination of the award, which showed the foundation’s strict compliance with rules and regulations regarding the stewardship of customer donations. The Foundation X SLs noted the entire credibility of a business depends upon exemplary, ethical, and legal behavior, and that illegal leadership or practices can risk nonprofit closure and a subsequent disservice to the community.

The participating SLs varied in their understanding of the key customers and concluded that the families, donors, volunteers, and researchers are all key customers for the foundation. The BOD relies on the Foundation X ED to engage and communicate with the families, donors, and volunteers. To demonstrate a commitment to the mission and ensure the workforce is striving for the same goals, the SLs of Foundation X engage with the workforce and key customers by working side-by-side with staff members and volunteers, thereby creating a work environment of positivity and effectiveness. The weekly team meetings keep the team engaged with the SLs’ vision and informed of the agenda, workforce limitations, and tasks required to stay on track with the schedule, as well as providing the opportunity to fill any resource gaps resulting from temporary absences and workforce deficiencies. The ED is responsible for operations and leads the staff, and to avoid confusion, the BOD does not have open access to the entire workforce of the organization. Typically, the BOD engages with the ED, or an appointee, to communicate the organization's vision and strategy for the whole workforce. Essential customer engagement occurs deliberately through internet blogs and *e-mails*, midyear appeals, and annual reports. When necessary, Foundation X senior leadership engages with families and donors through phone conversations, lunches, or face-to-face at meetings or special events. Unlike the ED and workforce staff members, BOD members have no direct interaction with key customers and have minimal engagement, unless a board member was instrumental in bringing a client or donor into the organization.

The nonprofit environment is very dynamic, and the ED and staff review the schedule, objectives, and actions monthly, as well as at the bimonthly BOD meetings to ensure the organization is on track to meet the goals and objectives listed in the four core segments on the current strategic plan. The action plans focus on the current year's fundraising and grant awards. The SLs are working on improving strategic planning efforts for the future and laying the groundwork for subsequent years. Foundation X SLs create an environment for success by confidently and consistently driving toward meeting the organization's mission, completing the objectives, and being steadfast on the journey toward their vision. The SLs of Foundation X realize customer needs change, and although they may have fallen-short of funding goals in recent years, they demonstrate flexibility by making course adjustments, and revisiting the strategic plan when necessary.

The ED sets priorities that drive the agenda of both the BOD and the internal team and focuses on action through positive engagement in staff meetings, board meetings, and strategic planning events. The BOD members are committed to planning, acting, and following through to complete mission objectives. The BOD members most successful in helping to achieve the mission of the organization are those who participate in all the meetings, come to the events, are aware of the operations, and maintain *e-mail* communications. As acknowledged by the participants, because of the limited resources and a multitude of responsibilities one area in which the organization could grow is setting priorities and driving a strategic plan agenda. Additionally, participants indicated the challenge of staying focused because the SLs compassion for those dealing with pediatric cancer makes it difficult for them to turn down any unplanned project, which often makes implementation difficult. The lack of structured priorities and limited resources creates a need for integrated external communication strategies that both send a consistent message and maintain relationships with customers and stakeholders; thereby, attracting new donors using fewer resources at a reduced cost and requiring less planning time up-front and more time allocated to completing objectives designed to improve processes and cultivate relationships.

Governance and societal responsibilities. The ED is responsible for keeping the workforce on task and ensuring awareness and compliance with the rules and bylaws of the organization. The ED has oversight of the BOD, and there is additional oversight from the committees on the board, such as audits of the organization’s HR and financial management. Additionally, for the board to verify the organization is meeting its goals, the bylaws require both monthly and biannual reports, and bimonthly meetings. Senior leadership suggests the organization's governance is dependent on the familiarity of key BOD members with governance responsibilities, such as legal tax responsibilities and corporate filings. The key BOD members take control of those areas of responsibility and plan the actions to ensure Foundation X complies with all local, state, and national fundraising laws.

The governance and bylaws contain rules for the evaluation process of the ED, BOD, and paid staff. In Foundation X, the BOD conducts an annual review of the ED's performance. The BOD sets goals at the beginning of the year and then analyses and assists the ED in identifying specific goals that are later quantified and evaluated during their annual performance evaluation. In February, the ED completes a self-evaluation and submits it to the BOD, who then reviews it and makes recommendations. This information and feedback are then shared with the ED during a board meeting by the HR committee. Currently, the BOD performance evaluation is a peer-level review, whereas, in the past, the BOD did not have commitments or objectives to rate their performance. In 2018, Foundation X instituted performance self-evaluation tools for each one of the BOD members to evaluate themselves and then submit to the board chair and ED. The ED evaluates the SLs workforce quarterly to ensure they are on course to meet end-of-year goals. There is an additional annual review of the entire team at year end.

According to the SLs, the only regulatory statutes or requirements Foundation X must follow are levied by the IRS financial audits, 990 reporting, and tax returns. However, Foundation X does not have a product or operation that is regulated by any outside entity. The foundation issues grant or awards to various establishments, such as educational institutions and universities throughout the country that have connections with major hospitals, to conduct the research. Foundation X requires a biannual report from grantees to ensure compliance and track the appropriate allocation of the funds go to the approved study. The report must be signed by the grantee's financial officers and an internal review board, which gives Foundation X the ability to both show and report back to donors.

Foundation X has various controls to ensure ethical behavior in all interactions, such as setting clear boundaries and rules through policy. Clarity begins in the job descriptions and bylaws applicable to all staff members, board members, and research employees. There are strict rules for handling money, credit cards, and dealing with research institutions and transparency is required, or a complete study, protocol, or puts the clinical trial at risk. Foundation X policy mandates that all volunteers who manage cash donations must undergo a background check for security purposes. Additionally, Foundation X SLs hold each other and the workforce accountable for maintaining high ethical standards.

Foundation X's mission is based on societal well-being and improving the care, quality of life, and survival rate of children with pediatric cancers, and the welfare of their families. At each monthly Foundation X BOD meeting, the codirector of the BOD reminds the attendees of the mission and shares a story about a child that is undergoing treatment or is a beneficiary of the research to set the direction. The focus of the Foundation X strategic plan is on raising the money necessary to fund more research and improve the social well-being of those children victimized by cancer. The SLs of Foundation X find ways in daily operations to keep costs low and to use the organization's revenue to fund more research. The strategy and fundraising efforts of Foundation X aim to support pediatric cancer research that may allow children who otherwise might not see adulthood, to live out their lives in a healthy way. Foundation X is committed to protecting a society plagued with cancer and mitigating the damages before it is too late.

Foundation X's key stakeholder communities are donors, volunteers, children with cancer, families, and research institutions. Senior leadership strengthen key stakeholders' relationships using clear, external communication to share organizational information, research results, financial results, and set expectations. Foundation X SLs support donors through letters, *e-mail*, and some direct conversation based on funding management and its impact on the intended community. Communications include sharing stories of success to personalize the result of donor contributions and ensuring accuracy and transparency of financial audits, 990 reporting, and tax returns. Foundation X supports and strengthens the volunteer community by high touch relationship-oriented interactions and mission engagement. Foundation X SLs meet their volunteers desire to feel connected to the mission by maintaining a positive and cheerful atmosphere, as well as providing support and ensuring they feel a deep level of appreciation for their volunteer efforts.

Another key component of the Foundation X community is pediatric cancer patients and their families. Foundation X SLs support this community by raising funds for research grants and survivor scholarships, interacting during campaigns and events, and providing children and families a storytelling venue. Lastly, Foundation X SLs support the researchers and research institutions community by offering a supportive, thorough, and consistent grant process to fund cancer research and through continually sharing research results with the community (Figure 4). Through this grant process, Foundation X SLs set clear expectations and guidelines for the intended research, as well as communicating progress to the other key stakeholders.

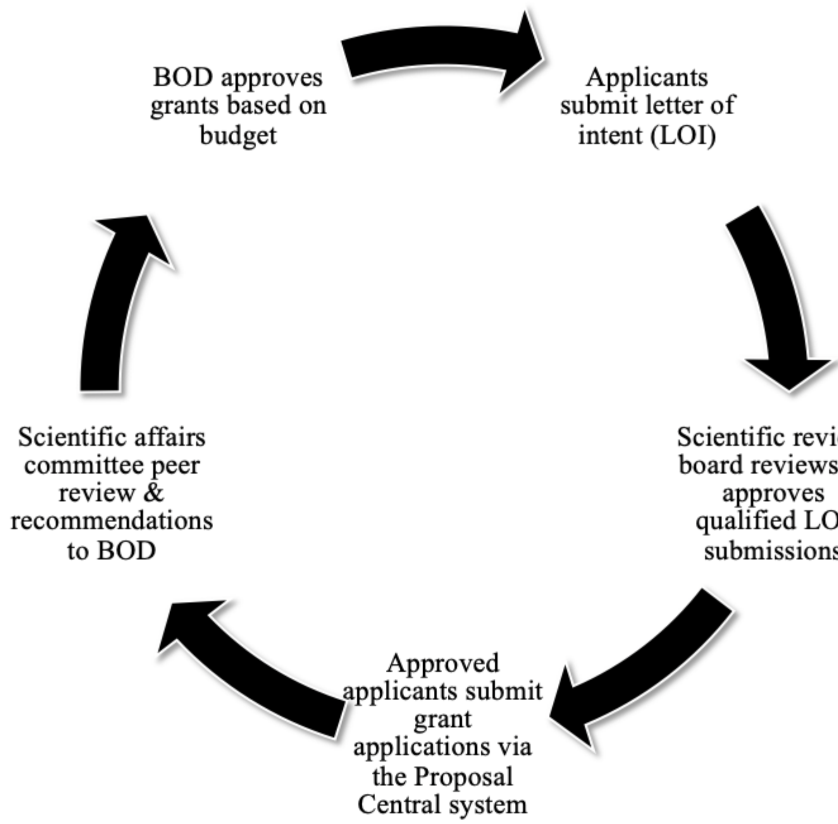


Figure 4. Grant proposal cycle and award process. This figure illustrates the cyclical process Foundation X uses to ensure a consistent grant process to fund cancer research.

Strategy

Strategy development. Foundation X conducts its strategic planning annually during the BOD strategic planning retreat. All BOD members, the ED, key managers, and an outside facilitator attend and participate in the organization's annual strategic retreat. The ED organizes and facilitates the retreat and drives the strategic planning effort. The

ED and key managers meet before the retreat to brainstorm, formulate, and develop a proposed strategic plan and budget for consideration and approval by the BOD at the retreat. In recent years, Foundation X SLs added to the bylaws a requirement to review and approve of the strategic plan every 2 years. To meet the BBB requirements the BOD informally reviews the strategic plan five or six times a year.

Foundation X's strategic planning process stimulates and incorporates innovation through the collaboration of the SLs, staff, and BOD members. In the past, the SLs noted that board turnover was low, and the strategic planning retreats covered the same topics repeatedly. Additionally, implementation of redundant goals occurred each year, there was no consideration of new ideas, and rewards for innovative ideas were nonexistent. In the last 5 years, the composition of the BOD changed to include members with different backgrounds, such as legal and auditing firms, as well as construction, resulting in the generation of innovative ideas from the SLs and staff and board members as well. Therefore, the experienced members of the BOD now bring cooperation and collaboration from different segmentations of the marketplace and pass on new perspectives, which stimulates ideas and helps implement plans for improving the strategic planning effort.

The Foundation X ED and key leaders collect both historical and current data for the organization, which is evaluated for relevancy in the pre-planning meeting and then used during the strategic planning retreats. Foundation X SLs collect relevant data through philanthropy reports created by Indiana University and the Association of Fundraising Professionals. Once they have obtained the reports, the SLs analyze the reports to understand what is determined to be a success or failure in the global philanthropic marketplace. Foundation X SLs work hard to compare the internal historical data, donor behavior data, giving guide trends, and the industry standards or guidelines to aid in the strategic planning process. Foundation X SLs have discovered through external data analysis and comparison efforts that the foundation is above the national average in peer-to-peer fundraising and the average value of donor gifts (Giving USA, 2018). Furthermore, the data is then presented by the facilitator and a critical BOD member at the strategic retreat to increase understanding and ensure efficient and effective planning.

The internal, external, and outside workforces perform vital processes within the organization. The Foundation X official workforce is the program administrators and office staff on the payroll, who accomplish key work processes described in the organization's critical position descriptions, and their activity supports the annual grant proposal cycle and award process. The essential position descriptions for the ED, philanthropy manager, office manager, and special events coordinator are dynamic and adjusted based on the strategic plan. The ED is responsible for assigning personnel to the key processes. Foundation X's volunteers are a critical element of the external workforce vital to the organization. Volunteers are essential for raising 35% to 45% of Foundation X 's revenue through supporting successful fundraising campaigns. The ED and the philanthropy manager are responsible for the events; however, many of the events are led by long-time volunteers familiar with recurring events, such as the golf tournament and gala. The external workforce and outsourced resources fill the gaps in expertise when the budget limits the hiring of a new employee. For example, for 2 years, there was a need for a grant proposal writer, and a few course adjustments to the budget enabled the foundation to hire a grant writer at the end of the second year.

Additionally, in 2013, an outside agency conducted an organizational analysis and discovered that marketing was a weakness; therefore, Foundation X SLs reviewed the marketing capacity and capabilities and contracted a firm to assist with marketing communications. The results of this 2013 study, brought to light Foundation X’s need to develop strategies for increasing their ability to communicate, market, and promote the foundation’s mission, as well as their need for support and advocacy to improve performance and continue to be competitive in the nonprofit sector. Thus, aligning with the IMC conceptual framework, which according to Czaplewski and Key (2017) defines how businesses, which includes nonprofits, can communicate with stakeholders. As such, the IMC conceptual framework was appropriate for this study regarding how to guide the exploration of effective communication strategies to attract new donors.

Foundation X’s primary goal is to raise funds and provide grants to selected research institutions and physicians conducting innovative pediatric cancer research. The 2017 established goal of Foundation X is to raise 5.1 million dollars by 2021 (Figure 5). Foundation X remains focused on meeting financial goals, determined by the number of grants the organization awards and drives the key objectives throughout the year. According to Foundation X SLs, the aim to reach 5.1 million dollars in funding falls into four categories of fundraising, support resources, public relations, marketing, and board of directors. The SLs scrutinize Foundation X’s objectives to determine if the objective falls into one of the four fundraising categories, what resources may be required, what type of donors will attend, and an evaluation of the ROI. The BOD identifies essential strategic objectives such as increased grant awards for each year in the annual strategic planning retreat report. The Foundation X grant award process is a 1-year cycle; therefore, the grant award cycle drives the schedule for key strategic objectives. Another essential 2017 strategic goal indirectly related to grant fundraising support is the conversion to a new customer relations management (CRM) database system that tracks financial information and keeps records regarding campaigns, donor information, and donor contributions.

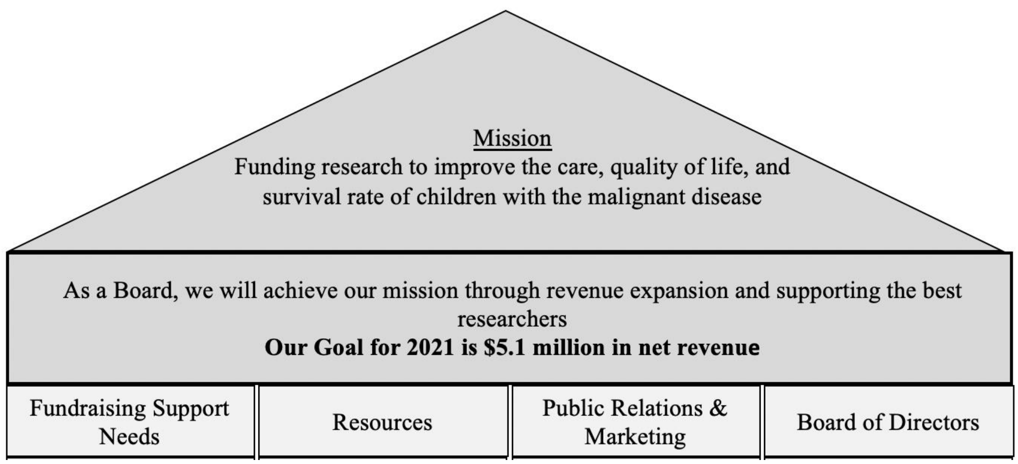


Figure 5. Foundation X's strategic goal for 2021. This figure illustrates the foundation's fundraising goal for 2021, which aligns to the mission, and identifies the predicted fund allocations.

Foundation X's strategic objectives allow the organization to stay focused on its mission, thereby enabling the foundation to remain in a proactive position versus a reactive position. The Foundation X SLs' steadfast commitment to governance rules and ethical behavior, naturally allows the SLs to maintain the appropriate balance within the organization. However, Foundation X SLs described the challenges they face, keeping balance while striving to meet objectives for the workforce. The workforce staff and volunteers are often called upon to go work outside skillset or to meet mission Foundation X has limited resources; therefore, the staff and BOD must work hard all the time, and when personnel issues are doing more with less becomes the regular operation. The ED promotes personal awareness and the maintenance of a work-life balance to ensure that competing priorities do not impact the organization's goals.

Strategy implementation. The clients' strategic plan implementation is accomplished through meeting objectives via efficient completion of the developed actions plans. The Foundation X action plans derive from the annual BOD strategic retreat to meet the financial goals to award research grants the organization made a commitment to at the beginning of the year (Figure 6). The SLs focused short-term actions on achieving business goals for the year through fundraising, which includes execution of the schedule of events each year. Each event has its lifecycle of 2 months, 3 months, or 12 months. To execute the schedule's key actions, focus on improving external communications to recruit volunteers, appeal to donors, increase brand advocacy, and attract and influence greater corporate involvement to increase Foundation X support and financial capacity.

Foundation X SL's long-term action plan includes actions such as creating relationships with large corporations, increasing family foundation support, and developing relationships within the community. A long-term marketing objective is to target executives at corporations by increasing brand awareness through communication, inviting the executives and corporate members to events, influencing the corporate donation decisions, and influencing their support of the organization as a BOD member. The intent of this research was to explore effective external communication strategies used by nonprofit leaders. The IMC theory provided a framework focused on the hierarchy of marketing communication effects, brand advocacy, communication touchpoints to reach target consumers, clear and consistent messages across channels, design of messages for implementation, and measuring effectiveness (Bormane & Šķiltere, 2018). As such, the results of this study may provide valuable insight for the BOD and senior leadership as the foundation develops an external communication strategy to meet their goals and objectives.

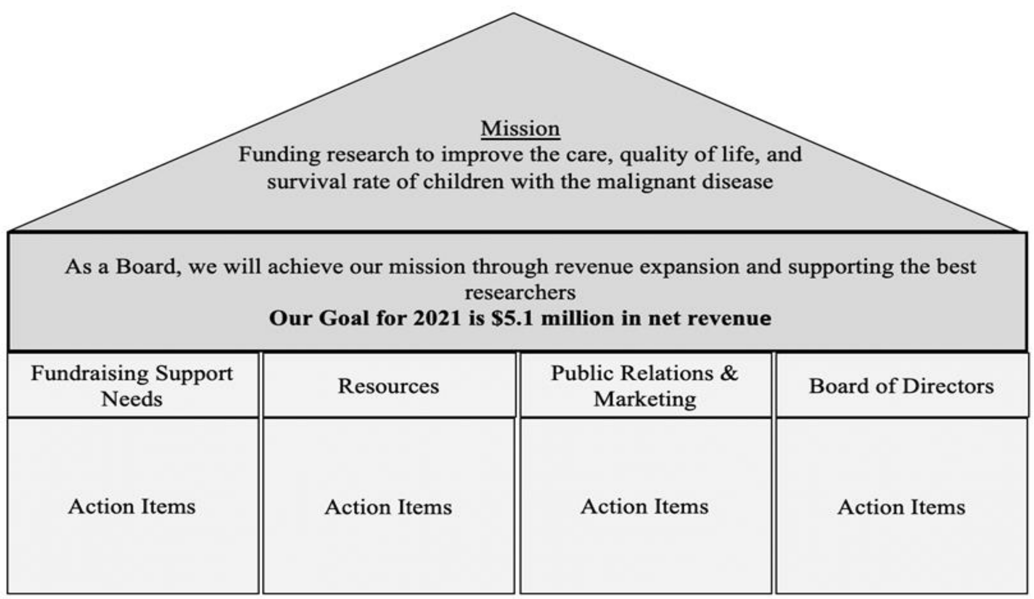


Figure 6. The Foundation's strategic plan framework. This figure illustrates the strategic plan utilized by Foundation X to ensure all action items are addressed and the foundation successfully meets the financial goals to award the research grants the foundation has committed to funding.

Foundation X’s strategic planning process output includes developing and documenting specific goals, objectives, and action plans for implementation and then scheduling and assigning them to project managers. The assigned staff or BOD member implements the action plans by taking ownership of that area and becoming responsible for the action through completion. The action plan manager is responsible for reporting at staff meetings and BOD meetings on the progress of the action implementation plan, schedule, and issues in the specific area. Foundation X SLs claim board members and staff are excellent at meeting goals and objectives when expectations and timelines are clear.

Since 2010, the organization has made great strides towards improving, aligning, and integrating personnel and key processes. With the organization’s change in leadership and subsequent collaboration with the BOD, Foundation X SLs recently revised their business plan to include a funding strategy that includes management reserve funds. The new business plan assists to mitigate setbacks in fundraising and provide assurance that Foundation X meets their annual research grant commitments. Historically, Foundation X SLs would make grant commitments before securing the funding; thus, putting pressure on the organization to achieve its yearly obligations. With the new business plan and funding strategy, the organization matches the promises with the actual funding on hand. Creating a more predictable environment and the credibility to meet current obligations at any given moment. Foundation X SL’s aggressive and consistent fundraising and extensive business development efforts assure the organization can meet the current liabilities.

For the workforce to be successful in the organization, SLs must provide the support needed. A vital element of the workforce support is Foundation X SLs' ability to assess the staff position descriptions and roles and work with the staff to ensure there is a clear understanding and achievability of each individual's responsibilities and expectations. Additionally, the SLs identified how the workforce job descriptions fall within the strategic plan to provide encouragement, oversight, and support to ensure success. Growing competition in the area is driving Foundation X to build its staff to increase the organization's capability and capacity to meet mission objectives. In the last 5 years, Foundation X SLs hired a new team to increase the number of high-quality events they organize. Also, Foundation X SLs outsourced or employed skilled consultants to assist in areas such as marketing and finance and aimed at reaching the 2021 funding goal.

Foundation X does not have a formal performance measurement programs, metrics, or tracking methods. However, the Foundation X strategic action plans align under the fundraising support categories, and the ED informally tracks the status of each category and action, which is reported at both board and staff meetings. From another perspective, some of the participating SLs link action plan performance measures to the financial results of the organization, which they share quarterly with the BOD and analyze for progress measurement. Furthermore, informal indicators such as the ability to commit to more grants or increase funding amounts to the current awards show growth and positively impacts the research community indicated by the increased number of researchers applying for grants. According to participating SLs, the only long-term goal commitment and formally tracked metric is to raise 5.1 million dollars by 2021. The performance projections are the approved annual budgets, and SLs understand it is vital to look 2 to 3 years beyond the yearly budget to map a course that enables Foundation X to reach the 2021 fundraising goal.

Additionally, the ED and the BOD establish informal measurements, the BOD tracks financial measures, and the ED metrics align to Foundation X's goals, such as the number of new corporations and amount of employee giving. It is the staff members responsibility to set individual team metrics for the distinct fundraising support categories. However, at this time, Participant A claimed that although the organization collects the data, there is little awareness regarding how the data can be used to influence processes and goals.

The current business environment demands agility as there is persistent competition among nonprofit organizations. According to Foundation X SLs, an area in need of improvement is the ability of the organization to establish and implement modified action plans should circumstances require them. Despite a need for improvement, there is evidence that the organization is practicing flexibility when needed and an example of this occurred in 2018 when the ED accomplished a successful and timely change in staffing plans, based on the testimony of Foundation X's decrease in fundraising performance in previous years. The ED has complete autonomy to adjust a project unless the change requires funding outside of the board-approved annual budget. According to the participant, the ED cannot hire or fire a full-time employee without the BOD's approval; however, modifications in hours and duties can elicit positive change necessary to stay current with the course correction. For example, the SLs hired a chief financial officer and later brought on a corporate relations person and stayed within budget by reducing the strategy hours of the grant writer. The foundation's struggle with limited resources demands the SLs to find ways to accomplish objectives using unique strategies that are both scalable and cost effective. The actions of the ED align with the recommendation of Adebiyi and Oluwafemi (2018) who indicated that a unique advantage of IMC strategies is the flexibility provided to prioritize methods to me budget allocations and achieve both short- and long-term goals. Although Foundation X SLs admit a need to improve in this area, they are already striving through organizational management efforts to structure tasks and resources to find efficiencies and cost saving practices, and gaining knowledge and strategies regarding integrating communications methods to streamline messaging will increase the SLs ability to reduces agencies and resources thereby alleviating the resource constraint.

Customers

Voice of the customer. The leadership of Foundation X listens, communicates, and observes customer stakeholders through one-on-one interactions that produce actionable data. The senior leadership primarily uses face-to-face interaction through phone calls, meetings, or special events allowing them to see giving behavior and learn the needs of their customers, which enables effective interactive communication that effectively increases word-of-mouth advocacy and identifies new donors, committee members, and volunteers. Furthermore, the senior leadership uses practical communication skills to listen to stakeholder expectations and intentionally make decisions based on that one-on-one communication. For example, during a direct mail appeal campaign, if the response data indicates that a large number of donors made donations, the senior leadership knows the campaign letter is on track with donors' expectations; however, when few donations are made the data provides the senior leadership with actionable information to change the campaign communications.

On the other hand, interactions, observations, and connections with families who are in treatment, the ultimate beneficiaries of the research, is mostly subjective. Foundation X is not a service nonprofit organization, but specific communications involve listening more to what beneficiaries convey, which helps Foundation X SLs decide what kind of research is most useful to the patient's family. The organization's SLs interact with researchers using one-on-one interaction via the phone or in person to answer questions about the grant proposal and award process, learn what research is most advantageous, and to notify the researchers of the selection process outcome; thus, setting them up for success and impacting advocacy of Foundation X's mission.

The Foundation X SLs customer and stakeholder communication processes are focused on event success and there is no formal or deliberate communication plan. The SLs interact with potential volunteers, donors, and researchers at special events and data shows the participants agree effective external communication strategies are essential for event success. Typically, existing customers invite their business associates, families, and friends to attend the special events and SLs seek out new attendees and volunteers, research background information if possible, and target potential candidates. Then, SLs develop relationships and present data that compel them to provide support. Additionally, the SLs take the opportunity to interact with the potential customers and teach them more about Foundation X to establish a reliable emotional connection to the organization and its mission. Additionally, researchers are continually looking for donors to support their work; therefore, the SLs continuously communicate with potential researchers who may be inquiring about the organization and data gathered from families, and previous research relationships with insight into acquiring research funding and needs.

Customer satisfaction is unique to the individual customer group and essential for Foundation X's success and sustainment. To determine successes and possible areas of improvement, Foundation X SLs conducts surveys after events to capture customer satisfaction, dissatisfaction, and engagement with the event experience through a rating scale. Moreover, Foundation X's donor and volunteer satisfaction or dissatisfaction and engagement are displayed very clearly through long-term support and giving behaviors.

The SLs believes satisfaction equals more commitment and increased contributions to support Foundation X's mission. Therefore, reduced engagement and decreased contributions is a sign of dissatisfaction. The customer's satisfaction with the organization and its workforce leads to commitment and a desire to maintain involvement, whereas a dissatisfied customer will generally find another charity. The SLs question whether the process should be formalized to include gathering reports of attendees at events, donations received, and comparing support from event-to-event for comparison, followed by reaching out to the customers to understand their reasoning and better gauge customer satisfaction, dissatisfaction, and engagement.

The actions the SLs of Foundation X take to ensure the development of strong relationships aligns with Duralia's (2018) claim that a vital principal of the IMC strategy is relationship marketing. According to Duralia, relationship marketing focuses on customer satisfaction and retention by recognizing the value of customer relationships in the long-term. In alignment with this recommendation, the foundation's SLs may incorporate customer feedback into external communication strategies as a method of two-way communication and to evaluate performance based on customer and stakeholder feedback, thereby striving to ensure long-lasting relationships. Nonprofit leaders gather customer survey information to inform and communicate organizational performance based on customer feedback results and address customer needs to improve performance in an effort guarantee customer commitment leading to increased contributions to support Foundation X's mission.

Foundation X SLs contracted with a private consultant in 2013 to evaluate the state of the organization and analyze the slight decrease in revenue and recent fundraising failures to establish a baseline for the new ED to determine the appropriate direction and areas of focus for the organization. The consultant evaluated Foundation X's local competition, capturing data based on the mission, business model, age of the organization, and revenue. The SLs and BOD then used the information to understand competition and discover unique ways to attract new supporters.

The SLs confessed there is no formal process in place to assess competition or market trends. However, the SLs maintain that relationships with other 501(c)(3) nonprofit organizations in the community and through word-of-mouth communications at events or from board members that served on the board of other organizations provide a plethora of useful information. Foundation X's ED is a member of multiple organizations that support nonprofit businesses and donates time and money to support and collaborate with peers in the community. Additionally, the ED is a national council member, whereas the council conveys best practices across the country to ensure foundations are properly supporting donors' needs as customers, event participants, board members, and committee members. This collaboration allows identifying what organization do to care for their customers.

Customer engagement. Foundation X is in the nonprofit market sector where the social cause and mission typically determine customer groups (Table 5). The foundation's customer groups are the donor which provide funds to a social cause for personal or financial reasons. The SLs believes the behavior and practice of nonprofit donors is dependent upon historical knowledge of the organization. Additionally, the researchers represent another customer group who expect the foundation to raise fund to allow them to conduct vital research to contribute to science and find a cure. The SLs make determinations regarding customer groups through customer behaviors, profiles, and potentials understood through general relationship building and requesting time, talents, or financial support. The SLs identify volunteers as an essential customer group because Foundation X could not operate without them. Foundation X holds a variety of special events that appeal to diverse market segments, for example, the annual golf tournament attracts corporate customers, while the run-walk attracts local families; thus, various special events aimed at a cross-segment of the distinct customer groups and market segments.

Table 5

The Foundation Supplier and Customer Roles

Suppliers role		Customers role	
Donors	Supply the funds for the research grants	Researcher institutions	Researchers want to conduct cancer pediatric research and need to find funding to conduct research
Foundation X	Supply the grants to research institutions	Donors	Donors want to make a difference for children with cancer and to find a trustworthy, successful cause/organization to support
Research institutions	Supply research results for quality treatment or a cure cancer	Children with cancer	Beneficiary of the research outcomes

The SLs of Foundation X are committed to developing emotional connections, trust, and loyalty with customers and stakeholders and through positive interactions, communication, engagement and cultivating relationships building (Figure 7). One goal of the foundation's special events is to ensure high-quality customer experience and enhance the customer engagement strategy. Foundation X SLs identify customers as donors, families, and researchers. The SLs of Foundation X ensures full customer access to information and support through Foundation X's new and robust website that provides information on different types of product offerings, the special events schedule, financials, and beneficiary success stories and updates. Foundation X's stakeholders can access organizational data through various blogs, social media postings, and active e-mail exchanges. Foundation X sends newsletters to the donors in their CRM database four times a year, as well as a midyear and a year-end appeal, to provide information on the organization and its mission.

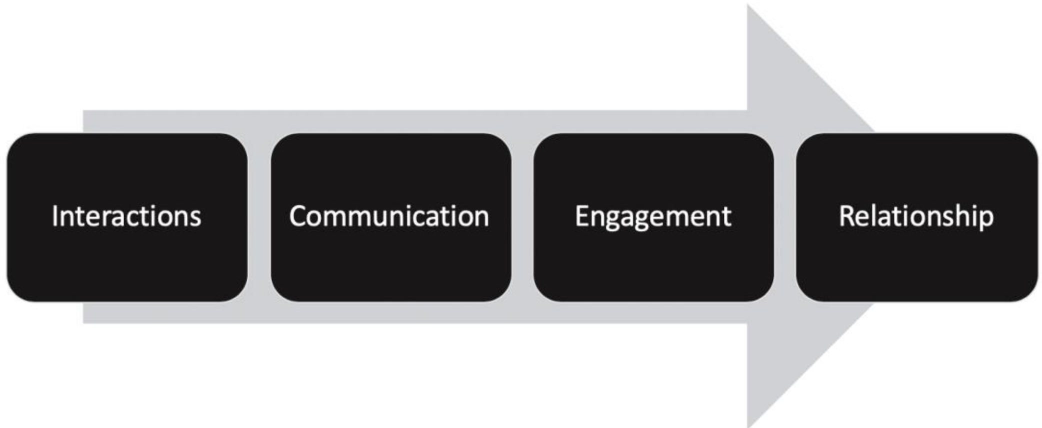


Figure 7. Client customer engagement methodology. This figure illustrates the methods the senior leadership of Foundation X implements to ensure they cultivate lasting relationships with stakeholders.

Moreover, the SLs established a free access phone line to ensure individuals can reach Foundation X and that the organization is responsive to the needs of current or potential donors and supporters. Although the Foundation's SLs recognize the limited amount of resources, every effort is made to keep up with the traditional agencies of advertising and public relations, as the SLs realize such marketing tools provide a significant impact to the transparency of operations and best practices. The SLs noted external communications is an area of growth for the Foundation and the staff, volunteers, and BOD are diligent about sharing information and advocating for customers and potential donors.

The SLs of Foundation X build a positive customer relationship by learning and responding to customer needs and expectations in terms of the organization's product offerings. The SLs focus on communication such as brand awareness, preferred media channels, identification of the desired customer role (donor or support), expectations regarding the experiences within the specified position, and the provision of information to ensure participants make informed decisions. The SLs practice the majority of building and cultivating customer relationships through special events using face-to-face interactions.

Foundation X SLs delicately and carefully manage customer complaints. The SLs understand that discontented customers may take claims to the BBB and that complaints in public or private forums may hurt the organization’s reputation, hence negatively affect the brand. Foundation X customer complaints come in many forms, such as event planning, meal dissatisfaction, and issues related to IRS rules, regulations and 501(c)(3) standard noncompliance. The ED actively listens to complaints to understand their validity and takes every possible action to resolve the issues face-to-face promptly, including following-up with the customer to assure them of a change or an explanation regarding why it cannot change.

Results Triad: Workforce, Operations, and Results

In this section, the results of the current workforce processes, operational processes, and performance results are reported based on the data collection and analysis for this study. This evidence may allow the foundation’s leaders to understand what processes are effectively working and what processes are causing problems that are obstacles preventing them implementing and achieving mission goals. This area highlights the foundation’s processes or activities to show true performance and evaluate the accuracy of measurement tools and standards used.

Workforce Environment

The ED is responsible for hiring the workforce and establishing a positive workforce environment. Foundation X SLs assess and plan for workforce capability and capacity needs in the annual budget. Budgeting for results starts with careful consideration of what an organization is trying to accomplish, Foundation X SLs' objectives and goals are developed in accordance with the annual budget. The budget is designed to support fundraising campaigns, special programs, and services necessary to meet mission requirements.

The SLs analyze the specific event budgets and the actual expenses required to ensure there are enough materials and resources to meet mission requirements. The foundation's workforce is the largest it has been since the establishment of the organization over 30 years ago. The SLs made some investments in the budget that were designed to build the workforce and meet the demands required to achieve the 5.1-million-dollar revenue growth goal by 2021. Participant B noted that the organization's stakeholders may get confused by the actual capability of and capacity needed to raise funds to help in the fight against childhood cancer, as well as the perceived scope of the problem to cure cancer as soon as possible; thus, this confusion may lead the staff to surmise that the capability and capacity needs are out of balance; however, Foundation X has a strong and capable workforce with the capacity to meet the current organizational goals.

For 36 years, the Foundation's positive reputation allowed for word-of-mouth recruitment of workforce members, which occurred on an as-needed basis. Of the current eight staff members, seven sought out Foundation X and reached out to the ED regarding possible positions, while the last four office managers have moved into new jobs with more responsibility within the organization. Working for a nonprofit organization requires a giving and selfless mentality that understands nonprofit leadership and staff are responsible for raising the revenue to support operations (Schultz, 2018). Therefore, it is vital that potential hires have nonprofit experience, either on the team or as a volunteer, and that they recognize meeting mission requires hard work, long hours, and commitment. The potential candidate must meet the job description requirements and interview with the ED and a staff member who understands the position. There is a 90-day break-in policy for all new hires to confirm that the new hire meets the expectations of the job. Foundation X's employee turnover rate is low and hiring occurs primarily to add essential positions to the staff such as adding a marketing manager, a financial manager, or corporate relations staff members. All participating SLs claim that Foundation X's retention is 100% because of the positive culture within the organization and the rewarding work environment.

The SLs of Foundation X recognizes that fundraising and preparation are constant and dynamic. According to the organization's SLs, they failed to prepare the workforce for the recent growth Foundation X experienced. Two years ago, the SLs and BOD set a foundation goal to raise 5.1 million dollars in 4 years, while they gave the ED the budget and justification to hire resources, the SLs focused on building the team and not on developing a strategic plan regarding the workforce.

The ED is responsible for organizing and managing Foundation X's workforce. The ED answers to the BOD for a management review where the BOD provides advice regarding staffing. The ED holds and manages the workforce through weekly staff meetings that include discussing the schedule and actions required for upcoming events and daily operations. The ED meets with staff members to review individual performance and ensure they are meeting Foundation X's employee needs. The needs of the organization may cause a realignment in the workforce; for example, a task with too many allotted hours may result in a shift of hours to another area. Internally, Foundation X is always moving resources to fit their current need as the organization undergoes continuous growth. Senior leadership participants stated excellent communication skills is the key to efficiently and effectively dividing and organizing the workforce.

The Foundation X workforce is in southern California, and all the staff works from one office. The workplace health and security are managed by direct contact between the ED and the staff, one-on-one interactions with each staff member and as a group if required. The SLs established a general policy to ensure there are always two employees present. The SLs observe the workforce and makes necessary adjustments, changes, and accommodations on an as-needed basis. A monitored alarm system ensures the Foundation X office building is a safe and secure work environment.

Foundation X offers its workforce a basic benefits package, which includes an IRA with 3% after 1,000 hours after 1 year of employment, $350 a month for medical insurance and dental insurance, and 8 days of paid holiday a generous paid-time-off program to supplement fair pay. According to Participant A, the foundation offers continuing education opportunities to develop and grow the workforce. While both Participants B and C were unaware of a formal program for continuing education opportunities. Foundation X’s commitment to the quality of life for all employees has earned the loyalty and dedication of their workforce.

Workforce Engagement

Foundation X SLs are committed to engaging its workforce through interactions and communication. The participating SLs assert that the ED’s management style and open-door policy are essential and promote respect and trust between the employees and staff. This style yields an organizational culture focused on performance and enables successful results. The SLs meet and interact with the staff regularly to exchange information and works side-by-side with employees and volunteers to assess the well-being of the workforce actively. The SLs believe that the active participation in daily activities is responsible for ensuring efficient, committed, safe, and secure operations with the confidence to effect change and full engagement of the workforce.

The critical driver of Foundation X’s workforce engagement is their clear mission statement, communication, and employment of staff and volunteers dedicated to the mission. The mission is the number one reason the foundation has been operating for 36 years. Foundation X’s SLs use communications to establish and disseminate the objectives of the organization and create plans for action. Moreover, communication assists client leaders to select, train, engage, and appraise the workforce. Communication is a business tool leader’s use to inform and motivate the employees to put their best into the job. Senior leadership communication is the impetus for engagement in and out of the foundation, such as marketing, branding, information exchange, feedback, and direct operations. An additional key to workforce engagement is hiring a mission-oriented staff and volunteers dedicated to the social welfare of the community they serve.

The SLs of Foundation X assess workforce engagement by measuring and monitoring the foundation's overall performance indicator, the growth of annual revenue raised to sustain the organization's mission. When Foundation X is experiencing growth with a very lean staff, workforce engagement becomes indicative of revenue growth and indicates a productive workforce and environment. Foundation X SLs recognize workforce performance management through annual reviews, but there is no avenue for compensation and recognition of excellent performance. The SLs admit they do not excel in workforce performance management, and all the SLs and staff struggle to complete the current workload; however, the SLs actively seek out employees and volunteers that understand pressure points and can readjust their workload accordingly. Senior leadership participants reason that Foundation X does not have a formal reward system that pays out bonuses for performance because of 501(c)(3) nonprofit regulations. The workforce rewards are intangible and achieved through the success of the mission.

The foundation SLs encourage outside learning and development through staff members collaborating with other organizations that promote advanced knowledge sharing. Participant A claims the ED inspires and financially supports staff members seeking to earn applicable certifications and credentials to enhance personal and workplace growth and to ensure the staff is confident and committed to the SLs and the foundation. However, Participant B indicated the organizations views on personal development is not a priority. Instead, the SLs become entrenched in operations and fail to balance learning and development with the organization's needs. Participant B recognizes members of the workforce occasionally attend training or participate in personal development programs; yet, it is on a haphazard basis and not always available to the entire workforce. Moreover, Participant C suggested learning and development programs for Foundation X’s workforce should focus on developing future leaders and key positions within the foundation. The SLs are working to maintain a better balance and places personal development as a priority for strengthening the organization.

The SL’s learning and development system consists of encouragement and tuition reimbursement; however, not all participating SLs agree there is a learning and development system to evaluate and Foundation X does not have a formal career development or career progression program in place. According to Participant A, career progression allowances for the workforce and future leaders are allocated in the annual budget and encouraged for the staff to pursue learning endeavors and develop and strengthen careers and areas of expertise. The inconsistency of responses to this inquiry may be addressed by creating a formal policy, process, and informing all eligible employees could establish an avenue for foundation employees to develop skills to improve operations.

Operations

Work processes. The key work processes of Foundations X are the grant proposal and award process and fundraising process. The organization’s central product offering is the research grants awarded to doctors and research institutions, and key work process requirements must produce funding for the grants and an efficiently organized and managed grant proposal and award process. Furthermore, Foundation X’s 501(c)(3) status drives requirements and dictates some fundraising work processes and products, such as processes associated with the donor database and the processing of gifts. The work processes related to fundraising are the management of donations, which include money management controls for receiving and depositing money, securing the payment, solicitations, record keeping, and showing the donors the foundation’s appreciation. In addition, the required transparency and accountability requested by the donors are central to the products and processes and are designed to foster trust, credibility, and show Foundation X is a dependable steward of their contributions.

Foundation X’s key requirement driver for the grant proposal and award process is the Proposal Central database system used as the central location for storing grant information, workflow submissions, and providing reports for reviewers. Proposal Central delivers a streamlined workflow with consistent information going in and out based on the grant proposal and award process rigid timelines. Research proposals submitted by qualified institutions are then meticulously vetted by a scientific review committee. The scientific review committee is comprised of oncology physicians recruited and vetted by a trusted outside source that is known for identifying the best doctors in the field. The grant proposal and award processes have strict guidelines for selecting and awarding research grants to various institutions and a continuous flow of information in and out of the foundation must occur to ensure accurate and timely execution regarding specific dates and rules for the letters of inquiry. The rigid schedule-driven process is necessary to award funds to researchers and maintain ongoing research efforts.

As stated above, Foundation X is a nonprofit organization that is solely dependent on charitable donations from individuals, families, and corporations; therefore, the donors require transparency and accountability regarding both contributions and spending. The design of Foundation X's products and processes is to gain confidence, show reliability, and establish credibility. The SLs understand transparency is vitally important; thus, the SLs design work methods to trace all donations from the time of gift solicitation to the time of gift acknowledgment. Process designs use software systems and are structured to show accountability and provide visibility to all stakeholders regarding donor intention and compliance for contributions.

Innovation, technology, and knowledge exchange are critical for business success. The SLs of Foundation X claim the organization is in a constant state of evaluation regarding the incorporation of new technology, organizational knowledge, product excellence, customer value, consideration of risk, and the potential need for agility. The foremost priority of the SLs is the stewardship of the charitable donations, gifts, and contributions, as well as meeting the mission goals and donor expectations. Innovation and technology are the keys to efficiency in a 21st-century nonprofit environment. Since 2017, Foundation X SLs recognize and invest in new technology for efficient processes and system grades to better serve transparency and accountability. The SLs understand that technology supports product excellence, reduces risk, and lessens the opportunity for error in submitting and receiving information.

The SLs identified organizational knowledge as essential to the organization's success. Being in business for 36 years, Foundation X's history extends far beyond modern technology, such as cell phones or the Internet. Thus, Participant C described it is imperative to continue the support, acknowledge, and respect elderly donors by keeping simple processes that do not challenge those donors on a technological level and risk losing their support. Alternately, the SLs relies on the BOD and the organization's committee experts to evaluate and score the grants for selection; hence, using the knowledge and skills of key personnel to consider and select new endeavors and target state-of-the-art cancer research.

Foundation X's processes are proven and consistent; therefore, failures or strategy changes drive improvements. The Foundation X ED is responsible for the day-to-day operations, and guarantees duties and assignments are predictable and reliable to ensure success in meeting the organization's mission objectives and key process requirements. The Proposal Central system aids in effectively and efficiently managing the grant proposal and award process, which decreases the grant process workload burden to the organization. The SLs and BOD members are critical to ensuring staff and volunteers understand the 501(c)(3) requirements, resulting in compliance for receipt of gifts, record keeping, and special events and campaigns. The organization's processes are guided and managed by information systems such as CRM and Proposal Central. The workforce job descriptions mandate the use of these systems and the improvements are from following the new requirements and knowing the shortcomings of the current systems.

Process management key measures and indicators allow the SLs to understand if the grant and fundraising processes are effective. The SLs of Foundation X stated the key benefits and attributes of the successful revitalizing of the grant funding and award process is the time and efficiency in completing tasks. For example, the manual grant funding and award process was slow and complicated. The implementation and use of the Proposal Central software system reduced time, increased data accuracy, and improved system access.

Additionally, with all data residing in a centralized system, the SLs control and improve grant writing processes through total visibility of individual grants in Proposal Central software system and can identify inefficiencies and hold-ups in the process. Furthermore, the fundraising processes have various informal measures that are reviewed every quarter in terms of funds raised versus budget requirements, or more specifically, a comparison of special event actuals with expected projections based on historical information. Performance indicators are essential and provide a picture to SLs regarding the effectiveness of their processes.

The key measures and indicators evaluate the success of an organization or vital activities such as fundraising; therefore, sharing goals, objectives, and performance information can be a valuable communication tool to improve performance or inform customers of the health of the organization. This aligns with the assertion of Anantachart and Chaihanchanchai (2017) that a critical component of the IMC theory is the establishment and nurturement of customer relationships. As such, process management of key measures and indicators are critical in understanding the strength and success of an organization for internal and external stakeholders and should be a key component of the overall nonprofit external communications strategy.

According to Foundation X's SLs, there are no formal key measures or indicators for improving processes currently. The participating SLs currently use as an indication of the effectiveness of the organizations grant proposal and award processes the projected goal of the number of grant commitments in comparison to the actual numbers of grants awarded to cancer research. Key process measures and indicators for are essential to success and growth or organization. The SLs believe creating measures that show the accuracy, accessibility, and visibility of the grant proposal and award process may provide continued process improvement in the future.

Foundation X SLs determine support processes based on a specific event or objective and the current capability of the staff, BOD, and volunteer force. The organization's ED consistently maintains good relationships with research institutions to determine necessary support processes. This determination is not a formal process, but SLs provide personal support to ensure research is a success and when on occasion a grant only funds 90%, the SLs explore methods to provide additional support to increase funding. Foundation X's required key support processes for operations include professional services such as financial, marketing, and the grant award selection process, as well as the fundraising support processes that include special events and campaign operations. Nonprofit organizations have limited resources to fund operations and meet all required process support needs such a marketing, fundraising, and financial expertise. The key to building and maintaining the resources for support processes is creating and cultivating relationship with volunteer stakeholders. Furthermore, in alignment with IMC theory, consistent and purposeful communication can be a powerful tool for business leaders seeking to improve performance and growth (Bhayani, 2017). Effective external communications are essential to communicate the foundations mission, resource needs, events schedule, and details for supporting activities. Communication channels such as the organization website, personal interactions, and direct mailing are a few of the touchpoints to reach potential supporters.

Foundation X’s professional services and daily activities focus on essential business requirements to ensure the foundation reaches mission goals by increasing effective external communications through promotional messages for events, creating brand awareness and advocacy, maintaining financial integrity, and guaranteeing skilled SMEs are involved in the grant selection process. For the fundraising support, daily operations staff and volunteers manage events, assist third-party operations management, and manage the CRM donor’s database operations, and website. Senior leadership oversight, consistent personal exchanges, and weekly staff meetings ensure the fundraising cycle support processes are continuous, and the financial components of managing and monitoring budgets are on track. The organization’s staff is a small team; therefore, the entire staff oversees all areas.

Foundation X SLs discovered that with a small workforce, a large governing BOD, and a reliance on the volunteers, effective communication is critical for the improvement of work processes and products. Senior leadership participants noted that improving performance means making smart decisions and abiding by all mandated regulations, policies, and guidelines set by the foundation. The SLs audit and evaluate operations consistently to minimize process variability, mistakes, and risks to ensure a more efficient organization. Using staff and BOD experience is another way to improve processes; for example, the foundation experienced a 30% growth in the past 5 to 7 years due to an increase in skilled staff and BOD. The ED of Foundation X began using new technology and processes, which made the SLs and BOD members more efficient at the grant proposal and award process.

The SLs of Foundation X varied in responses regarding their understanding of the organization's suppliers for the unique social mission of awarding grants. One participant viewed the Foundation X as the supplier to the children and families, while another participant viewed the donors as the suppliers for the funding required for the grants, and a third participant viewed the researchers as the supplier of the completed research given to the community. Hence, Foundation X's suppliers denoted as the donor supplier and the researcher supplier. The SLs manage the research suppliers using the workflow mandated by timelines and reporting in the Proposal Central system. Senior leadership operates the donor supply chain through education, effective communication, and positioning the foundation with individual and corporate donors, as well as soliciting feedback on expectations and desires. The SLs ensure messaging is aimed at individuals and corporations and communicates using marketing and promotional campaigns, maintaining an accurate and up to date website, and effective use of social media to extend the foundation's message via the Internet.

Foundation X suppliers are the research suppliers and donor suppliers. Foundation X SLs suggest that through the grant proposal and award process, the research institution suppliers are identified and ensure the highest quality research is funded to provide the community knows the results of the research. The more prestigious and successful protocols developed, the more guarantees can be delivered, and the easier it is to secure increased donations. According to Participant A, the organization does not select donor suppliers. The donor suppliers typically select Foundation X by making a small donation at an event, based on exposure, corporate influence, or employee giving programs.

The SLs measure and evaluate the research institution’s performance through the grant process requirements. Once selected, the research institution suppliers are approved and may begin working, while the system is made up of checks and balances such as scientific update reports for evaluating and measuring performance. Additionally, the SLs suggest that during selection research institutions are measured and evaluated and should be assessed at the end of the 1-year or a 3-year grant contract, before awarding them a commitment to continue their research. Consequently, Foundation X must establish a process to measure and evaluate the research institution’s supplier performance to review the success or failure of past research. Foundation X SLs measure and evaluate the donor suppliers’ performance two to three times annually, by generating a CRM report to understand the top donors and provide dollar amounts for mid- and year-end appeal. The SLs evaluate donor supplier behavior and investigate other ways to involve active donors in Foundation X’s events or campaigns.

Foundation X SLs communicate with suppliers through various channels. The BOD scientific advisory members interact with the researchers to provide positive support and feedback regarding donors' interests and impressions of the research results. In addition, SLs give input to the research institutions not selected to help them improve their grant submission for the following year. Overall, the participating SLs claim more could occur to provide better feedback to researcher suppliers. The SLs communicate with donors' suppliers through the organization's stewardship reports via *e-mail*, which reports on an event's attendance, as well as the funding raised and how those funds are purposed. Additionally, the top 100 to 200 individual donors receive a personalized letter from Foundation X explaining how their contribution impacted the mission. Lastly, another way the organization communicates to donors is through an annual report where they list feedback on overall contributions, as well as the overall performance of the foundation.

The foundation does not have formal recourse actions in place for the poor performance of its suppliers. Foundation X research institution suppliers that show poor performance are not selected for future grants. Additionally, the donor suppliers that have not contributed in 2 to 3 years and are not engaged in the process are not called daily; however, the donor information remains in the system. Foundation X provides immediate support to all suppliers that demonstrate poor performance to ensure success.

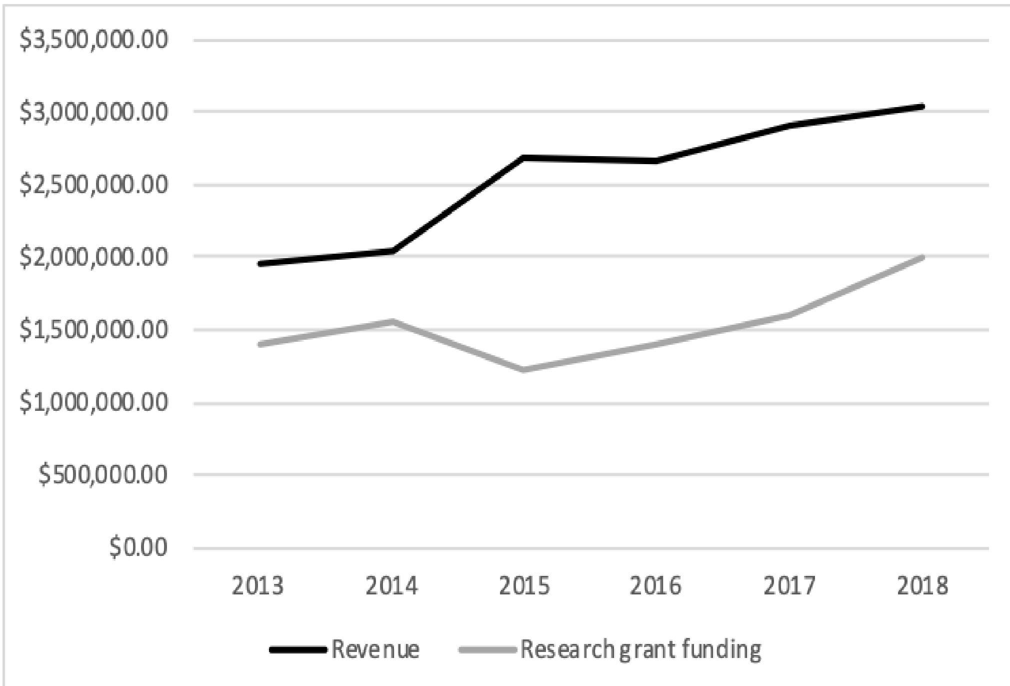
Foundation X does not have a formal process for innovation management. However, the SLs understand innovation is very important, and suggests selecting and funding new methods for state-of-the-art cancer research is pursuing new ideas. The foundation uses an outside panel of experts to inform them about innovations in the cancer research field and as an enabler to pursue opportunities when scoring the grant requests. Another area the SLs practice and implement innovation are looking for ways to create and streamline operations within the organization. Foundation X's website had with software errors, difficult to manage and incurred a variety of website issues where customers could not find the site or donate through the website. The participating SLs invested in a website redesign to interface with the new innovative contract management system at a lower cost.

Foundation X SLs continue to pursue creative opportunities based on thorough investigations and perceived ROI. The foundation must raise the capital to continue to invest in innovations and new ideas to improve processes. Currently, the ED needs commitment from the board for all unbudgeted investments; therefore, if there is no room in the budget there is a lack of innovation investment. Foundation X SLs are very thoughtful in transitioning support from one opportunity to another because they are a nonprofit organization, there is stringent scrutiny of all strategic decisions, and the BOD has a significant control and self-efficacy; therefore, each transition requires sound justification. The organizations grant proposal and award period are the driver for any changes to the research grant opportunities the foundation is pursuing.

Operational effectiveness. The yearly budget is based on annual revenue earned and research grant funding commitments that drive the foundation's operational effectiveness (Table 6). Therefore, the foundation must raise enough revenue to fund research grant commitments and the expenses required for fundraising and support efforts.

Table 6

2013 -2018 Revenue and Research Grants Funded



The budget is established at the annual strategic planning meeting based the historical information of prior year's campaign and event donations raised. Thus, Foundation X controls costs through a rigid annual budget process, strict rules regarding changes, and SLs courage to stay within that budget. As a nonprofit, the SLs must be efficient, thoughtful decision makers, and spend the least amount of money for fundraising support activities as they generate more donations. The organization's SLs and staff are aware of the budget and controlling it is part of their job. The SLs review the budget monthly and have a request for proposal process that controls spending.

Additionally, the SLs and BOD have a 6-month budget status review to understand expenditures and implement adjustments to stay on track. The organizations SLs recently hired a part-time Chief Financial Officer to help manage the daily productivity and operational effectiveness of the foundation.

Foundation X incorporates cycle time, productivity, and other efficiency and effectiveness factors into work processes based on the annual budget process and individual roles and responsibilities. The SLs understand the foundation's growth in recent years and incorporated different functions to assist with productivity and workload efficiency. The participating SLs noted that a nonprofit organization is in a constant state of production to generate the funding required to meet the mission, and change is a work in process and not always planned by SLs but initiated by the workforce as a see-understand-act. Foundation X does not have warranty costs or customers' productivity losses.

Foundation X SLs emphasized the importance of staying within the boundaries of the annual budget and view cost control as a top priority to meet mission goals as a nonprofit organizations where individual donations are the only revenue source. Foundation X SLs stated a grant proposal request is submitted for budget approval for the organization's financial audit. To save costs, the SLs assess various Certified Public Accounting firms to conduct audits on the organization. However, SLs claim the costs of inspections, tests, and process performance audits do not apply to the foundation funded by the grants after award. Foundation X SLs balance the needs for cost control by ensuring costs are low enough to support more research. The SLs are mindful of the budget and manage operations to stay below or within the annual budget and adhere to the guidelines of maintaining a below 20% cost of doing business. Cost control is an area of strength for Foundation X and is critical to success of the mission because the organization is solely dependent on individual donations.

Foundation X SLs ensure the reliability of the organization's information systems through a perpetual state of review, with three people at three different levels reviewing the data on a daily, weekly, monthly, and annual basis. Furthermore, two separate systems measure the same information relating to monetary contributions, one method is a general ledger, that records all donor contributions and the second is the CRM system that houses customer information and donation amounts. The organization manages the systems through quarterly reconciliation and an annual audit.

Foundation X SLs rely on a third party 24/7 monitoring of the systems to ensure the security and cybersecurity of sensitive or privileged data and information. Additionally, systems requirements for the usage of passwords limit the number of people that have access to privileged or personal information. The SLs established controls based on position and training of access to information and levels of access through signed confidentiality agreements and the use of passwords. Foundation X SLs rely on and are continually being made aware by the third-party information technology security team, of different alert systems regarding potential threats, such as the latest phishing attack or various weaknesses on the website or server. The outsourced information technology security team detects, responds to, and recovers the foundation's systems from cybersecurity breaches.

Foundation X SLs provides a safe operating environment by using the ADT security system for the physical office location where people can operate in a safe and secure environment. The ADT system motion detectors and cameras provide visibility of visitors before opening the doors and alert the workforce of smoke, fire, or break-in dangers. Foundation X does not have a formal safety or accident prevention plan. The SLs ensure the office doors have locks and that the ADT security system is active. The SLs rely on individual communication and reporting for accident prevention, inspection, root-cause analysis of failures, and recovery.

Foundation X does not have a formal plan that addresses disaster and emergencies. Because of their location and the high frequency of earthquakes, the office has an earthquake kit, and SLs have staff contact information to reach out to check on employees. In an emergency, the SLs stated that operations might pause, and the Foundation X key staff would continue business operations for a minimal amount of time using laptops and the Internet. The organization stores information and data in the cloud; therefore, the foundation could be back online in a matter of hours by accessing the internet and retrieving the information necessary for operation. Senior leadership participants noted there are no suppliers or partners that would be necessary for the organizations continued operation in a disaster or emergency.

Measurement, Analysis, and Knowledge Management

The 201-2020 Baldrige Excellence Framework (BPEP, 2018) was the tool used to determine how Foundation X gathers, uses, and manages the data available to improve their data, information, and knowledge resources. This information was then used to establish key indicators and metrics to analyze and suggest improvements to processes to increase performance, as outlined in the 2019-2020 Baldrige Excellence Framework. As such, the Foundation X senior leadership may use the data and information to inform decision making, strategic planning, and development to align the organization and provide direction. Using comparative data can assist SLs in assessing trends and determining how to position the organization within the competitive environment to elicit success. The senior leadership should address the organizational performance results through their external communication strategies to inform external stakeholders thereby promoting trust and transparency.

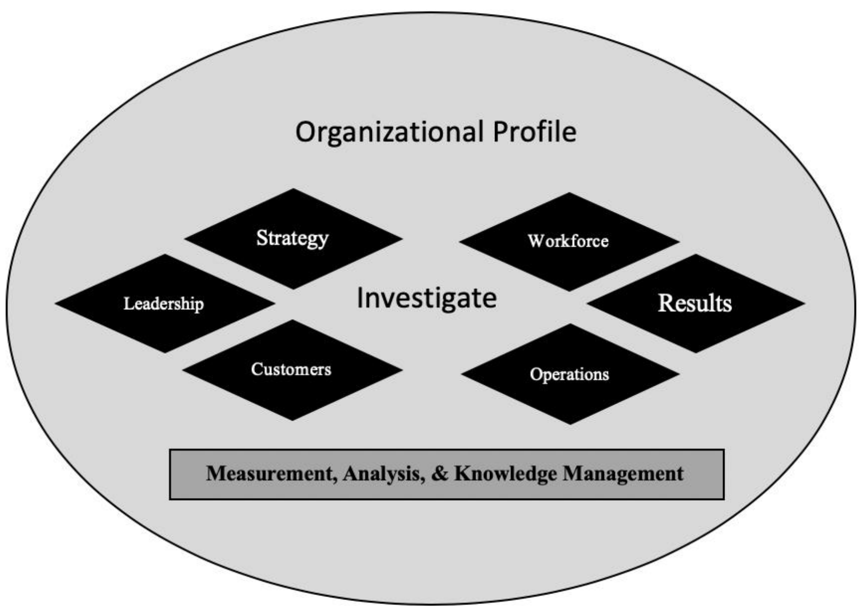


Figure 8. 2019-2020 Baldrige Excellence Framework. This figure illustrates the components organizational leaders should investigate when evaluating their organization.

Measurement, analysis, and improvement of organizational performance. According to the participating SLs, the donor information and financial information stored in CRM, Raiser's Edge, and QuickBooks systems interface with one another to track fundraising data, customer information, operations data and are used as a check and balance to reconcile data. Foundation X SLs stated the CRM donor database contains donor information feeds into Raiser's Edge, which is another level of checking to ensure they honor donor intentions throughout the transaction. Raiser's Edge is a black box software program that tracks individual customer's information, contributions, and participation in various events, which is then routed systemically to QuickBooks. QuickBooks tracks financial transactions, accounts payable, accounts receivable, daily information receipts, donors' giving history, and most importantly, is private to the foundation. The systems interface with each other to provide an extensive series of checks and balances. The systems are reconciled periodically throughout the year to ensure consistency of the information in all systems. The separate data sources give a holistic view of operations, fundraising performance, and expenses. Not only does the data collection and tracking provide an accurate picture of the organizational performance, but it also assists in understanding the processes and controls.

The Foundation's SLs analyze and compare the foundation's performance through analysis of actual donor giving trends using the CRM captured data and compare the QuickBooks financial accounting information which leads to enable fact-based decision making. Foundation X SLs have a strict budget process review quarterly and annually, using the foundation's internal data to examine revenue and profit and loss data.

Furthermore, SLs evaluate events yearly to measure performance and analyze historical information, attendance, sponsorships, individual donors, and auction items.

Foundation X’s process for capturing the voice of the customer data and related information is based upon donor behavior, including their contributions or participation in events, and individual appeals during the mid-year, and year-end appeals solicitation, in the Raiser's Edge system. The SLs identified that customers are more effected by an emotional appeal and respond more favorably to a survivor or a warrior success story versus analytical or research-based information. For example, information distributed that is solely research-based without the emotional tie to a family or individual elicits less positive feedback, donations, and support.

Although the appeals provide great information, it is the interpersonal relationships with donors and event surveys that provide the raw data and customer nuances that create the most benefit. Additionally, Foundation X SLs consider the nonprofit sector information as the Association of Fundraising Professionals distributes annual fundraising benchmarks, reviews peer-to-peer fundraising, and assesses trends and industry standards on Charity Navigator or GuideStar websites. These sources are comprehensive and reliable for comparative analysis against others in the nonprofit industry.

Foundation X’s informal performance measurement processes gauge fundraising performance and the inflow and outflow of external communications ensuring the SLs are flexible and agile in their response to rapid changes. Foundation X’s performance and results are budget oriented and driven based on the product offering. Therefore, if the SLs are falling behind on meeting the fundraising budget goals to reach the determined number of grants for the year the data and SLs budget reviews and analysis will provide a clear picture to enable adjustments to the schedule of events or marketing and promotional communications. Accordingly, the SLs carefully plans weekly reviews and ensures Foundation X has the appropriate staff to respond to necessary and rapidly changing conditions, as well as empowering the staff to identify challenges proactively.

Although the organization’s performance is relatively static year-to-year, some Foundation participants argue the current information systems have been around a long time and may not be nimble in terms of their ability to respond to unexpected issues and significant turn of events. For example, during the 2008 financial crisis, Foundation X was slow to respond, analyze, and adapt, which resulted in a massive decrease in funding. However, in 2019, Foundation X began implementing the CRM system, which provides better information and a more rapid response to external changes.

Foundation X SLs receive feedback in event wrap-up meetings with staff and volunteers to obtain immediate feedback from personnel operations regarding evaluations of sponsorships, registrations, auctions, and types of customers. The SLs review each event data six times a year before the board meeting to ensure the performance level is acceptable, the smooth operations, resources are adequate, and the organization can meet the year-end goals found in the strategic plans. Event feedback is critical to improving operations and donor experience to assure word of mouth advertising. Foundation X projects future performance through the budget process, assessing the financial condition of the foundation, cash flow needs, and both past and current performance monthly to ensure it matches and meets the strategic plan objectives. Moreover, the BOD meets to review the foundation's performance annually, where the treasurer of the foundation, board members, ED, with input from the finance committee, share those results with the BOD.

The benefits of capturing and analyzing performance data can be realized in improving issues before they become too costly. The SLs of Foundation X can use the findings from performance reviews to develop priorities for continuous improvement and opportunities for innovation. The foundation SLs can use the performance data gathered from internal sources and the industry to match or exceed the trends in fundraising momentum and foundation growth, based on the time of the year, giving behavior, and new movement in the marketplace. The study findings may contribute to development of external communications strategies and plans regarding how the foundation addresses stakeholder inquiries and communications, as well as information and materials leaving the foundation. The foundation SLs can use the information resulting from this study to appraise the fundraising operations-based revenue and prioritize strategic objectives to strengthen organizational performance to meet revenue goals.

Information and knowledge management. Foundation X SLs use checks and balances to ensure the quality of data and stress the importance of imposing tight controls through strict, clear policies and procedures to ensure factual reliable data and information. A critical system established by their senior leadership is the two-person access rule that all staff members can access and view the data, but two trained staff members input data to ensure accurate information. Structured positions result in the extraction of reliable analytical data to help the organization's leaders make logical and sensible decisions regarding improvement. Another vital control is the reconciliation of data; this occurs both quarterly and at year-end. Foundation X SLs are confident in the process and restrictions with regards to the integrity of that information.

According to Foundation X SLs, in the last 5 to 7 years, the organization created a unified established plan that defines information management processes to ensure quality information is collected and stored, as well as ensuring management and oversight of information external to the foundation, is consistent, clear, and factual. With useful internal information, SLs guarantee the data is available through the organization's website, blogs, direct mail, and word of mouth. The site provides accurate and up-to-date data on the mission, product offerings, beneficiary information, grant process, researchers, schedule of events, financial information, and offers visitors an avenue to make contributions. However, when reviewing the foundation's website, I did not find Foundation X's mission statement on the home page, but rather on the grant tab that provides information to the researchers on the grant process.

The SLs of Foundation X stated there are no formal training objectives or avenues to develop organizational knowledge; however, it is an open workspace, accommodating to helping, and training, and bringing others along. The Foundation X SLs and BODs have many years of experience in both nonprofit and for-profit management, therefore ensuring they have adequate experience to mentor others. Training occurs informally through staff meetings, team building, board retreats, and strategic planning meetings. Most staff members and volunteers are long-time committed members familiar with the foundation and have experienced numerous interactions with long-time board members and staff through informal meeting situations.

The foundation's SLs disseminate best practice and information to staff internally with both daily face-to-face interactions and shared by SLs in staff meetings, team and committee meetings, and through BOD meetings and retreats. Participant C noted the ED has an all-hands weekly staff meeting to share the upcoming events and the do's, don'ts, and best practices based on past events. The members of the BOD have experience in all aspects of the foundation and nonprofit organizations, and they attend meetings, such as the finance committee meetings and investment committee meetings, to share prior knowledge and give insight regarding why things are done a certain way, as well as to educate members on 501(c)(3) rules. The BOD members have one-on-one interactions with the staff to share experiences, which helps to keep the organization on the straight and narrow, for example, issuing receipts to customers for the different events, specifying the exemptible tax rules, compliance issues, and record keeping for tax returns. In terms of embedding knowledge and resources, the SLs and the BOD actively meet and talk to people, sharing valuable knowledge and experience.

Collection, Analysis, and Preparation of Results

The purpose of this qualitative single case study was to explore effective external communication strategies used by nonprofit SLs to attract new donors. The collection, analysis, and results assisted in answering the research question: What effective external communication strategies did nonprofit senior leaders use to attract new donors? Responses collected from the semistructured interviews and document analysis, assisted in data collection and analysis process, and enabled me to identify themes in the context of the Baldrige categories essential to a systematically assessing organizational processes and performance outcomes. Key themes that emerged are (a) leadership; (b) strategy development which assisted senior leaders to develop and vision, ensure transparency, and create reliable messages to attract new donors; and (c) effective processes customer engagement processes revealed effective external communication with customers groups and stakeholders. Additionally, maintaining vigilance over cost control proved positive for the foundation. Areas for opportunity were found in (a) key work process management which if improved may provide solutions to relieve the current stress placed on resources, (b) using data for performance measurement may and create donor loyalty and trust through communicating performance results, and (c) inserting business development strategies as part of external communication strategies may provide and avenue to attract business partnerships and corporate donors targeted to increase donations.

Once I developed an understanding of the critical processes in each category, I began exploring whether or not Foundation X's SLs were effectively attaining the outcomes desired for the organization and how the effective external communication strategies are used assisted in achieving the strategic goals (see Blazey & Thompson, 2017). The data revealed issues in the areas of leadership, strategy development, and customer engagement, noting communication with staff, customers groups and stakeholders as positive. The themes arose from Foundation X SL's ability to use of *e-mail*, websites, blogs, social media, direct mailings, and annual reports to communicate with customer groups and stakeholders, as these types of interactive communication drive positive results. Also, in the results category a clear theme that arose was effective budget cost control. Budget cost control results emerged when the data revealed the organization was able to make 2019 grant commitments based on the money raised and, in the bank, and the rate of expenses to revenue decreased. However, the data identified a process results opportunity related to the foundation SLs lack of an effective external communication strategy; therefore, indicating Foundation X SLs lack business development strategies that target new donors, provide consistency of brand messaging throughout communication channels, and ensure continuous evaluation of external communication methods. For example, upon first signing onto the foundation’s website, the information provided was both confusing to and ineffective for new viewers and Participant A noted the website was mainly used by current customers; thus, discouraging potential donors from offering support. The results of the analysis indicated that effective external communications are critical for the success and growth of nonprofit organizations and an opportunity for improvement for Foundation X. As such, the foundation SLs, staff, and BOD must communicate internally to direct operations and advocate for the organization using effective external communications to attract new donors. The results indicated the foundation practices effective external communication using IMC methods to attract new donors and may benefit by integrating business development strategies to enhance new donor recruitment.

Product and Process Results

Foundation X's vital fundraising and grant proposal and award processes played a role in awarding grants that brought about excellent results in the fight against childhood cancer. Since the organization's inception, leadership vision and strategy, successful performance along with research conducted through other nonprofit organizations since 1975, has assisted in increasing the cure rate for cancer to well over 80% (American Cancer Society, 2019). Furthermore, since 2012 Foundation X SLs' leadership, strategy development, customer engagement led to fruitful fundraising support processes and yielded almost double the revenue, apart from 2016, which showed a slight decline. This slight decline in revenue caused Foundation X's SLs to assess processes and identify investments required for change. The increase in revenue enabled the Foundation to provide more grants to fund vital research for educational institutions and medical centers nationwide. The steady climb in revenue is a display of positive results in the product and processes area (Figure 9).

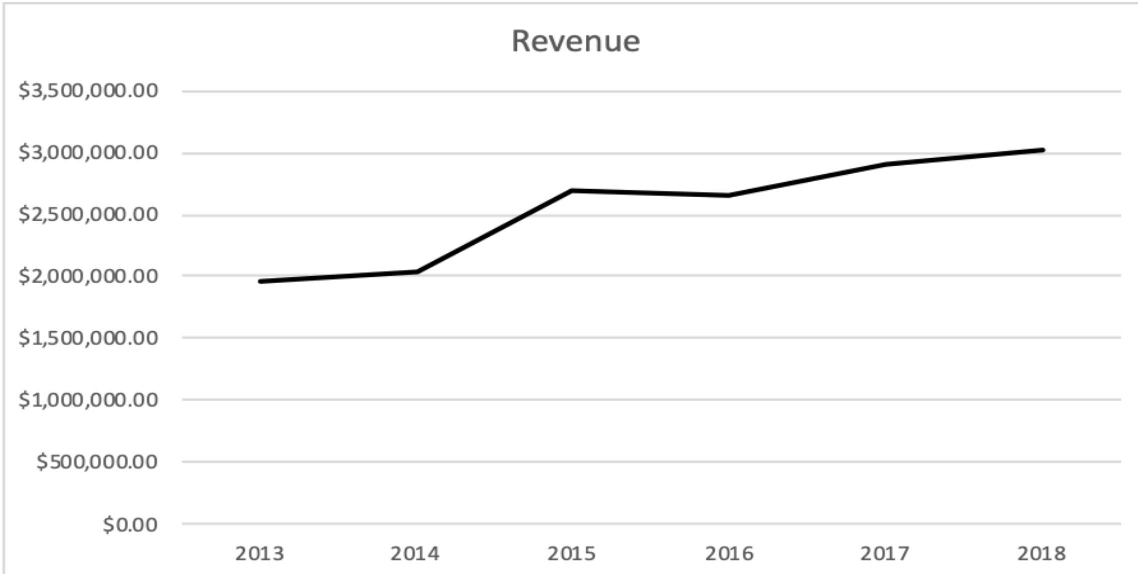


Figure 9. Total client revenue and support, 2013-2018. This figure illustrates the consistent growth of Foundation X's revenue stream.

Foundation X's local competitors include Alex's Lemonade Stand, whose mission is to generate funding and raise awareness of the causes of childhood cancer, as well as raise funding for researching new cancer treatments. Another known competitor is St. Baldrick's, whose mission is to fund life-saving research, to find cures, and to provide survivors with long and healthy lives. According to Foundation X's 2013 organizational assessment report, which was conducted by an outside agency, the organization showed slow growth, raising only 28 million dollars in 30 years compared to its competitors (Pediatric Cancer Research Foundation, 2019) whereas Competitor 1 raised over 60 million dollars in 6 years, and Competitor 2 raised $100 million dollars in 8 years.

Additionally, the 2013 organizational assessment report noted that Foundation X's organic roots and its dependency on only one doctor acting as the foundation's primary advocate among the research community were limitations to the foundation's growth, which Foundation X took steps to remediate. Another important indicator of success is that Foundation X's fundraising strategy is board-driven with family support, whereas the foundation's competitors are volunteer-based and reliant on corporate sponsorship and support. As indicated in the paragraph above, the 2016 decline in revenue earned impacted the number of grants funded. Although Foundation X has been behind its competitors' revenue earnings since 2012, the foundation is moving up among nonprofit organizations raising funding for cancer research (Figure 10).

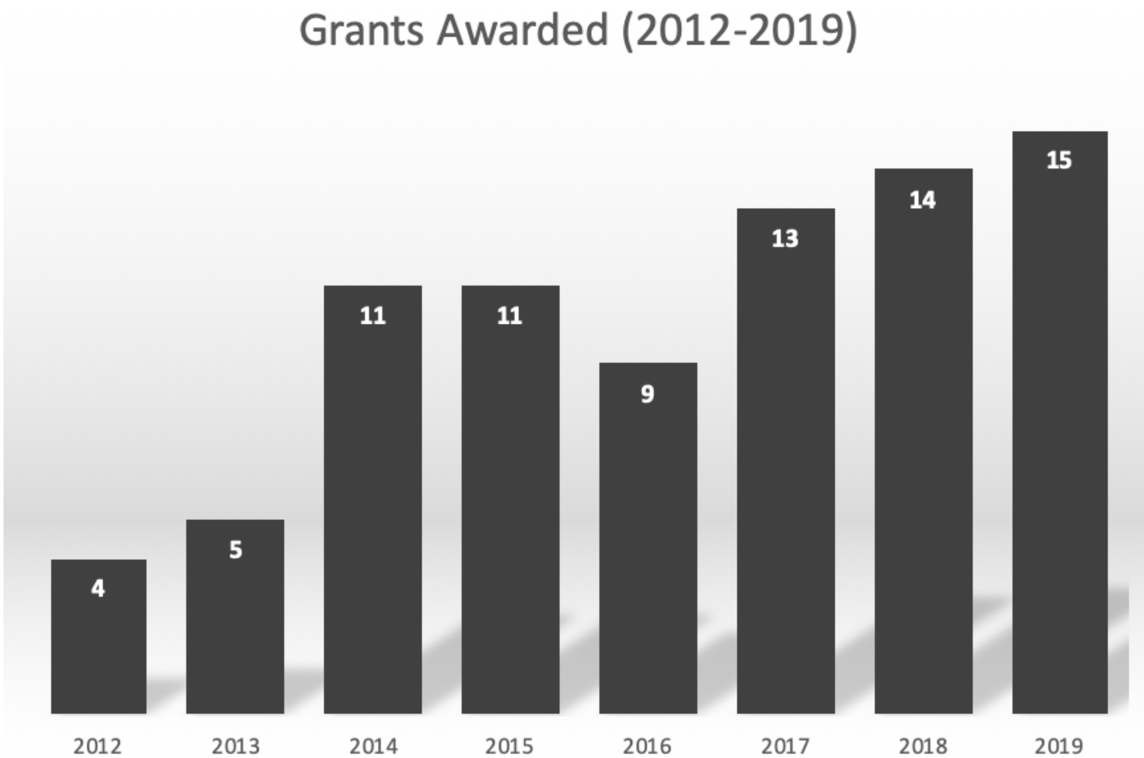


Figure 10. Foundation X grants awarded from 2012 to 2019. This figure illustrates Foundation X's continued increase the number of grants awarded for the past 8 years.

The Foundation X SLs focused on streamlining the grant proposal and award process to create a more efficient workflow, accessible to researchers and the foundation's committee members, and integrated for submissions, reviews, and reporting. The improved Proposal Central information system is more intuitive regarding the grant categories identified for researchers and has a submission inquiry letter template for internal investigation and an advanced inquest for institutional compliance. This informs the submitting institutions and the foundation earlier, alleviating questions, and indicating how much money Foundation X must raise. Moreover, according to Participant C, the foundation’s process for grant selection excels by using the experience of professionals in cancer research via the Scientific Affairs Committee’s scoring process to ensure the effectiveness of the grants.

Another key process Foundation X used to drive fundraising actions has been consistent fundraising meetings to ensure the fundraising goals set for special events and campaigns meet the organization's target objective to raise 5.1 million dollars by 2021. Data revealed the resource challenge faced by some nonprofits, creating inefficiencies because of the multiple roles and responsibilities of staff and volunteers. Fundraising work process management in the form of training and documented work processes may provide structure for key work processes and alleviate strain on staff members and volunteers. The foundation’s SLs view fundraising as a time-conscious activity aimed at influencing individual donors to gain financial means intended for the support of their mission. SLs collect donor data from each activity, using that data to compare and assess event performance may reveal areas for improvement of processes. However, client SLs focus on ensuring the attendees have a great experience and invite friends, family members, and colleagues to the next event, as well as use word of mouth advocacy. The increase in annual budgets implies that Foundation X’s revenue is increasing and resulting in positive fundraising support processes.

Some of the Foundation X SLs are unaware of safety and emergency preparedness specific to the foundation’s workplace and have never had to exercise safety or emergency preparedness procedures. However, participating SLs indicate there is a safety program for the office. The SLs have laptop devices, and the organization's information is stored on the cloud to be accessed anywhere with internet connectivity.

Donor supply chain results are trending up based on a budget of 1.1 million dollars in 2011 and a budget of 3.4 million dollars in 2019, which shows tremendous progress. Foundation X SLs record the fundraising management results for donor suppliers on the organization’s annual tax return. The IRS and the 990 forms filed with the IRS show performance results and provide transparency. The upward trend shows a focused team with good brand advocacy practices, and adept fundraising support processes, which aid in increased charitable contributions. The SLs of the organization maintain great longstanding relationships and Foundation X has 48 donors that have been giving consistently for more than 10 years, indicating a good, active, healthy organization that people continue to trust.

Customer Results

The SLs of Foundation X claim that accurate measurement of satisfied customers is shown by the increase in event attendees, which has been increasing on a steady upward trend for the past 5 to 7 years; thus, customer satisfaction is excellent (Table 7). Foundation X’s donor customer satisfaction is rising because of the SLs’ communication efforts to increase awareness of the foundation, solicit donations, share success stories, and invite surveyed feedback. Business and stakeholder communications is vital to an organization’s performance and sustainability. SLs should focus on using IMC strategies to improve two-way communication to ensure customers and stakeholder’s need are met and customer satisfaction is assured.

Senior leadership members direct and mediate communication to resolve issues for dissatisfied customers, with complaints centered around events only. Foundation X's current grant holders continue to apply for grants as well as to prolong research and grant submissions and inquiries from new research institutions are increasing each year; thus, demonstrating researcher satisfaction of the grant proposal and award process. The SLs identified that the organization's customer groups and suppliers have dual roles. Each participant had a varied idea of the foundation's primary customer group and main supplier group; however, the participant responses included all groups, but the responses did to match in relation to the primary customer or supplier, Table 7 shows the combined participant responses.

Customers and suppliers are external stakeholders that provide the funds, resources, and products for mission success. This aligns with IMC theory as Kotler (1979) posited that the enhancement of external communication strategies increases the organizations ability for growth. As such, effective external communications using an IMC approach gives SLs the methods to reach new donors. Resulting in greater numbers of customers that make monetary donations, which ensures the organization's financial capacity to achieve mission goals and sustain operations.

Table 7

Foundation X Event Attendees

Event	2013	2014	2015	2016	2017	2018
Golf			84	108	75	80
Gala			200	140	149	156
Dribble			50	95	87	99
N-HOB			160			
RC Golf	288	288	288	288	288	288
Gala			250	219	284	196
RD O	72	72	72	72	72	72
Run/Walk		3756	3046	2803	3445	3999
College Dribble		500	650	900	650	600
KB						
ABM						
MCR					40	
TSC						85
Dine & Donate						
Restaurants					37	330
Total	360	4,616	4,800	4,625	5,127	5,905

Foundation X continues to raise more money and has seen an increase in the value of individual gifts each year since 2016, enabling the foundation to increase the number of grants awarded and research institutions supported (Figure 11). To continue this trend, the SLs are focusing on ensuring that donor customers have a pleasant experience at events. They are working on cultivating relationships to establish a personal connection for long-term giving and support, in the hope of developing new board members, supporters, and sponsors. The continuous grant renewal shows positive researcher customer engagement results and the senior leadership striving to create long-term relationships with researchers. This interaction is designed to help nurture the researchers during the early stages of research to more advanced research projects. Foundation X SLs are seeing a steadily growing roster of researchers returning year after year, from an initial three researchers to now six to eight researchers who are return customers. Return customers reveal a positive progression and an upward trend in the number of researchers and the capability of the organization to allow the researchers to develop protocols and advanced research.

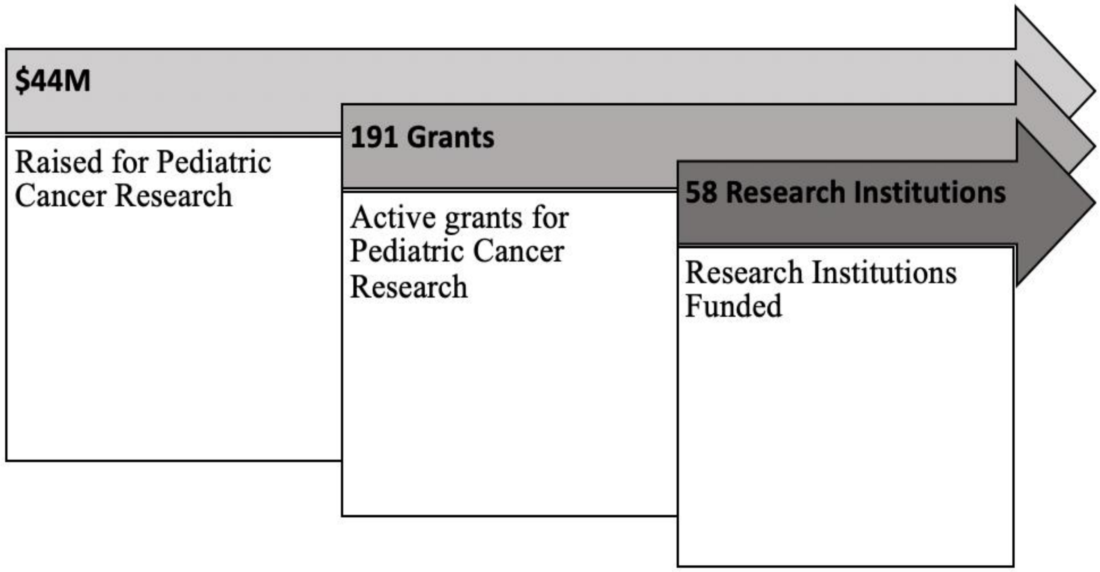


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Figure 11. Client accomplishments through 2018. This figure illustrates the total amount of money raised, grants awarded, and research institutions associated with Foundation X as of 2018.

Workforce Results

The foundation SLs and staff facilitate and operate advanced fundraising campaigns and special events to improve business performance to meet the mission and continually raise more money each year. Demonstrating a skilled and capable workforce and indicating positive results for the capacity of the organization, SLs ensure and measure capability and function by the skill of the staff members and then compare the number of hours the staff and volunteers work to get the job done against the charitable donations made to the organization for each event. Foundation X's ED is continually reviewing the strategic goals and objectives against the capability and capacity of the workforce and revising the budget to adjust and fill in the gaps. This proactive measure ensures the workforce is capable, and there are enough staff and volunteers to meet fundraising capacity needs.

Foundation X SL's positive attitudes, dedication, ethical behaviors, and commitment to the mission drives the positive office culture and the environment. The SLs described the results as positive, specifying that growth and development for individuals from administrative staff positions to specific higher areas and that the retention rate is high. The foundation's staff consists primarily of women, and the SLs noted age may be the only diversity factor and does not have an influence on the organizational climate. Foundation X's SLs asserted that diversity should be an area of focus, and they consider hiring individuals of different mindsets to ensure diversity and new ideas, although the staff works well together. The foundation's SLs agree they should focus on acceptance and inclusion in the nonprofit environment when hiring for new positions since the workforce is working toward the same mission, dedicated to the cause, and finding a cure for pediatric cancer for in a positive, healthy environment. The SLs noted that the workforce is over-tasked from the constant and perpetual efforts required to meet the mission goals; yet, there is an energy that is special and instigated from an atmosphere of support, camaraderie, and a shared vision and mission.

The Foundation X workforce engagement is positive, and this is witnessed through the organization's high retention rate. The foundation's ED has never had to reprimand any staff member or had any other HR issues because, as the SLs posited, this is a result of the conversational and open-door policy among SLs and staff. A team that can converse and shares concerns and questions regarding the workload needs individuals who can promote a stress-free and supportive community within the office. However, SLs described that the lack of diversity might be an indicator of positive workforce engagement. Explicitly, Participant C stated, “The success of the workforce and the low turnover rate that proves the workforce is very engaged and has a great sense of purpose and garner positive results.”

Foundation X’s workforce and leader development results are signified by 30% of staff members partaking in continuing education by attending seminars or stretching individual capabilities and taking on new leadership roles. Foundation X's ED allotted money in the budget for career development and learning and actively encourages team members to continue taking educational classes, accepting challenges outside of a job description area, and engaging in learning something new. Foundation employee development is supported by several members who previously held the office manager position and have now moved up to jobs with high-level responsibilities. Moreover, a staff member taking specific career classes and enrolling in a master’s degree program in fundraising for personal development is an indicator of developing foundation leaders in the workforce.

Although there are positive indicators, the participants explained, the foundation does not do the purposeful development of the workforce and leadership. Development of personnel occurs when staff members are in a situation requiring them to learn new skills immediately or to become a leader when there is a gap. Additionally, foundation SLs claim that employees must be willing to learn, grow, and try something new as that is going to occur in this type of organization by default. The key measures or indicators of the workforce and leader development are that employees must be self-motivators. When people branch into new areas of business development or presentations, it is a victory for the foundation. The foundation SLs believe financial triumph is an excellent indicator of success. The fact that the organization is not stagnant, meaning that the staff and volunteers enjoy the foundation's new programs, fresh ideas, and different ways of undertaking events is an indicator that the foundation is exhibiting positive trends regarding the growth and development of the workforce.

Leadership and Governance Results

According to Foundation X SLs, the revision of strategies and goals to focus on increasing product offerings, improving fundraising strategies, optimizing campaign management, and instituting sound financial processes is creating positive results. In 2017, the foundation’s SLs added survivor scholarships to the product offerings, which continues to provide benefits for survivors (Table 8). Leadership results indicate a positive trend by increasing revenue, updating technology, and improving grant proposal and award processes as identified in the leadership goals and enriching the overall guidance and support of the foundation. Thus, the goals outlined by the new leadership show positive trends in growth and advancement toward future sustainability.

Table 8

2017-2018 Scholarship Program Accomplishments Since Inception in 2017

Year	Number of scholarships awarded	Total funded
2017	12	$21,000
2018	26	$30,000
2019	30	$40,000

The SLs and BODs of Foundation X actively communicate and engage with the customers and the workforce and feel it is the most powerful toolset for the success and growth of the organization. The SLs and staff members interact and communicate with donors to inform them of the updates, research progress, financial transparency, and to identify potential improvements, as well as obtain results through sharing success stories and emotionally connecting with individuals. Targeting external communications as a method to reveal the message of the mission and share success stories to which the donors' contributed, causing engagement to happen. Furthermore, the SLs engage in internal communication with the workforce through daily interaction and the open-door communication policy set by the ED. The SLs encouragement for development creates an atmosphere of confidence and commitment witnessed by the high retention rate. Senior leadership participants suggest that communicating with and empowering staff members to engage with donors and volunteers and build relationships will increase for future growth.

However, according to Participant A, the BODs engagement with the staff, volunteer workforce, and customers is lacking. The participating SLs think some board members are not engaged or contributing as they should be, while forcing other SLs and board members, to be over-engaged. Although the BOD communication and engagement results are low, engagement with the staff and donors with the same vision and values results in a highly effective organization that is outcome-oriented and continues to provide more funds each year (Table 9)

Table 9

2013-2018 Funds Allocated to Research Grants

Year	Funds allocated to research grants
2018	$1.9M
2017	$1.6M
2016	$1.4M
2015	$1.2M
2014	$1.5M
2013	$1.4

Foundation X’s processes for governing consist of by-laws for the BOD and policy for the staff. The participating SLs agree the BOD governance is an area that needs improvement. The SLs do not currently hold the foundation's board members accountable for fulfilling the commitments that they made to be on the board and ensuring the balance of fundraising responsibilities and obligations. Foundation X's BOD president and executive committee are responsible for board member accountability. According to the SLs, only a few years ago, some BOD members were inactive for 20 to 30 years, which created a void in productivity for the BOD. Consequently, recently, the ED pushed for a call to action for leadership engagement to make a change and hold members accountable to their commitments and the organization.

Another dynamic that aided change in the organization is that the foundation ED now manages the BOD and has direct and supportive communication to assist in keeping individual members on track. The BOD leads the ED in the same way. Furthermore, Foundation X’s ED is taking the necessary steps to ensure that change is permanent. The ED has taken steps such as implementing a mid-year commitment review to ensure full accountability of the BOD and the agreements each board member individually makes. The SLs noted improvements in recent years regarding the area of the board leadership and the executive BOD leadership. As indicated in the following statement by Participant C, “the ED’s vast knowledge and experience are having a good effect on the whole organization.” Furthermore, the continued development of and improvement to the foundation’s governing processes and policies are vital to the strategic direction and operations of the foundation.

Foundation X SLs explained the legal and regulatory results are outstanding and are exhibited by the organization maintaining its 501(c)(3) status and that the organization is in the top 90% in terms of meeting all legal and regulatory obligations. Additionally, Foundation X passed the BBB biannually with a clean record, which shows there are no actions against the foundation and that they are a viable contender in the marketplace. The SLs ensured Foundation X has a continued high rating in GuideStar and has had a four-star rating from Charity Navigator for several years.

Foundation X SLs found that in the past, board members who did not follow the code of conduct and made inappropriate comments or statements aloud in board meetings regarding the management decisions and staff of the organization were not held accountable. According to Participant A, currently, the misconduct of a board president was addressed, and board members are subsequently reprimanded for breaches of the code of conduct, specifically when conducting business by speaking with doctors or reviewers about private grants and confidential conversations in grant meetings. The SLs indicated that all members of the foundation leadership act professionally and ethically, following all IRS and other in-state laws necessary to continue qualifying as a 501(c)(3). Foundation X's annual audits are clean and rarely have findings displaying anything other than high ethical standards, transparency, and accountability to donors and researchers. A measure of ethical behavior is not shirking the responsibility to make tough decisions or have tough conversations about protecting the integrity of the organization.

Foundation X’s result for the societal well-being of its vital communities, children, and families impacted by cancer is trending favorably with cancer rates in children improving by nearly 20%. First, the foundation fulfills the mission with relevant research results that are improving pediatric cancer survival rates and with fewer side effects and then, making sure the families get the necessary support. Additionally, the staff guides them toward survivorship programs, which is outside of the organization's mission. Foundation X aided in successfully improving pediatric cancer survival rates, and there are certain types of pediatric cancer studies where researchers are close to finding a cure. Moreover, SLs claim that because of the research they fund, children are facing fewer side effects, and children are not as plagued with consequences resulting from their treatment as they have been in the past.

Foundation X SLs noted the results for the achievement of the organizational strategy and action plans depend on the management of the budget and cost control. The SLs achieved and met Foundation X's budget each year from 2014 to 2017 and fell short of the 2018 budget by one dollar. The SLs and BOD endorsed a strategy 2 years ago focused on changing to achieve new growth, attract new board members and donors, and update the foundation’s technology. Thus far, the results are showing positive traction for this organizational strategy. However, the participants argue that the strategic focus is narrow and could be expanded to employee giving and matching gifts through corporations. According to Participant C, the last update to the strategy was 2 to 3 years ago with a new direction, new plans, and the steps that must be accomplished to meet the action plan. According to SLs, the process is falling behind; however, the organization continues toward goals and objectives. Also, to improve the foundation’s MVVs that have been in place for the last 8 years. However, Participant C believes the foundation has gotten off course; thus, SLs should revisit that plan and make a few minor adjustments. On another note, Participant C suggested they are useful in recognizing things that are not working and revising the strategy before the failed objective becomes a burden on the foundation's financial stability.

Although Foundation X's SLs growth strategy has seen slow results, the grant process has made significant technological advancements over the last 7 years, going from files in a file cabinet to an online tool with sophisticated cloud storage. Given the positive results in revenue and the number of grants awarded, potential researchers are continuing to seek and recognize Foundation X as a source of legitimate funding and support. Foundation X SLs believe strategic planning improvements can be made by focusing on future years instead of only the current year, measuring the effectiveness of the strategic planning meeting and strategic plan execution, and developing new strategies and ideas followed by conceptualization.

Financial and Market Results

Financial performance results for Foundation X are trending positive and can be found on the organizations IRS form 990 reports and financial statements on the website (see Figure 9). Senior leadership participants have seen growth each year with a slight backslide in 2016, indicating growth in both areas, the grants awarded, and the foundation's revenue from fundraising. Foundation X's 2017 year-end closeout ended with enough assets to pay off all liabilities for 2018, making the organization viable and healthy. The participating SLs noted the foundation is at the strongest point in its history. The foundation's SLs long-standing goal was to have the money in the bank each

December to cover the following year's grants before they make the commitments. In 2018, for the first time in Foundation X's history, the foundation SLs had the financial means necessary to make 2019 commitments in the prior year. These results show that Foundation X has achieved a level of sustainability that cannot be swayed by the economy.

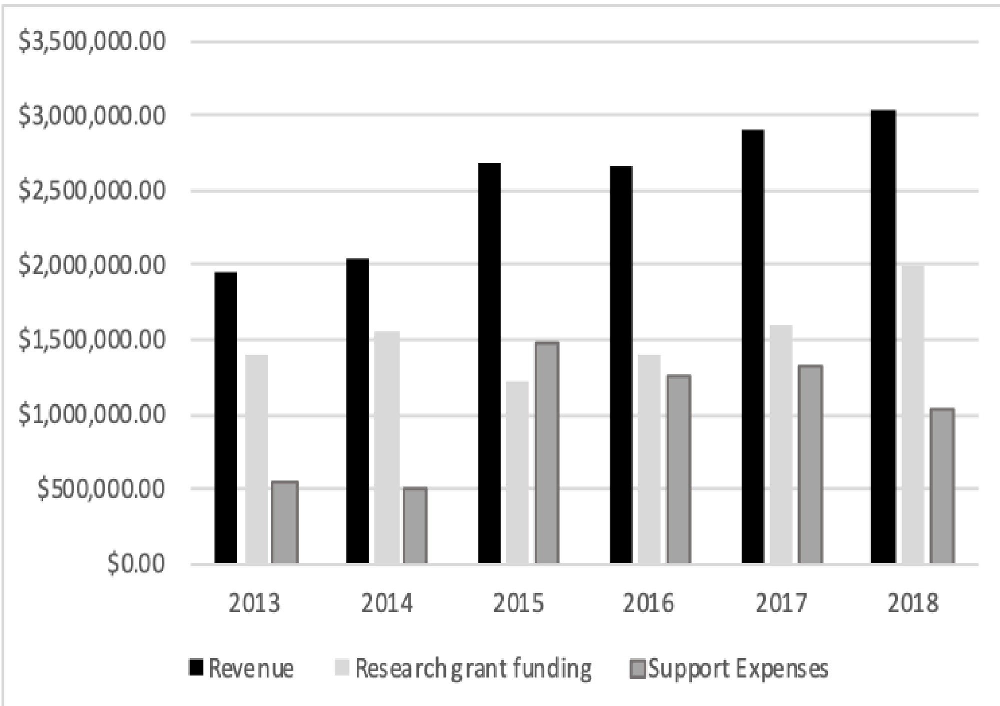

Figure 12. 2013 -2018 Annual budget considerations. This figure illustrates the factors that are considered when developing the annual budget.

Foundation X is rising in the marketplace, indicating positive results compared to both their historical data and their competitors. The SLs witnessed slow and steady organizational growth after implementing the strategic change efforts, with consistent limited resources and faster revenue growth and more grants awarded. With the foundation's financial results mentioned above, Foundation X's reputation as a stable and financially healthy positions the foundation SLs to attract more institutions and initiate more research requests. The SLs implied the foundation has a strong performance for the SME nonprofit organization regarding the number of grants funded, and the quality of the research funded. Nonprofit granting organizations are a narrow field and with different market segments and customer groups; the SLs submit that Foundation X is an impressive member of the nonprofit marketplace. Using IMC strategies to inform external customer groups of marketplace performance data for comparison may influence potential customers with buying decisions.

Key Themes

Process strengths. The first theme to emerge from an analysis of the data aligned with the Baldrige Excellence Framework (see BPEP, 2018) Categories 1-6 is in the area of process strengths for the client. After reviewing and analyzing the participant transcripts, documents, and client website and assembling the data, the analysis revealed process strengths that appeared in the Baldrige Excellence Framework leadership triad Categories 1-3, leadership, strategy, and customer engagement. The process strengths key themes are in the areas of (a) leadership, (b) strategic development, and (c) customer engagement. Foundation X's process strengths are vital drivers to the increase in revenue in the past 3 years, as noted in Figure 9. The foundation SLs are focused on creating an environment centered on strategic management and customer satisfaction while assessing risk and balancing resources. In the last 5 years, Foundation X’s BOD and SLs strategically sought change to revitalize the organization through making significant strategic planning process improvements by developing a strategic plan framework to capture the central goal, objectives, and actions to achieve the goal (see Figure 6). Furthermore, interview data in Baldrige Framework Element 1.1 showed the strength of leadership as witnessed in the proposed new and improved MVV with an added positioning statement submitted to the board in 2019 to align with the new strategic plan framework (Figure 13). The SLs are focused on leading and guiding organizational change that will enable future success through creating an action-oriented environment toward strategic objectives.

According to the data collected during interviews and document analysis for Section 2.1 strategy development, the foundation's SLs outsourced the task of assessing the health of the foundation as a baseline to understand where to invest resources in improving performance. The assessment provided a thorough evaluation of the organization's strengths, weaknesses, threats, opportunities, and views of the local competition as a baseline and direction to improve organizational performance. The information enabled Foundation X SLs to revise goals and develop focused strategic plans. The new goals the SLs developed included increase product offerings, improve fundraising strategies, optimize campaign management, create better financial processes, and provide customer and stakeholder support. However, including external communication strategies using IMC methodologies as a component of the foundation's strategic planning efforts, focused on increasing new donor support, may enable SLs to achieve financial goals more quickly. The foundation's SLs strategic planning and implementation process included staff strategic planning preparation meetings, a BOD and staff annual strategic retreat, and monthly and weekly action plan reviews. These meetings ensure project accountability, task accomplishment, and establish communication to resolve issues to guarantee a success orientated organization. Foundation X SLs are continually investing and aligning the organization with the established strategic goals and have seen proven results evidence by an apparent growth in revenue.

Another process strength is in Baldrige Framework Element 3.1 Customer Engagement, through effectively communicating with stakeholders. Through interviews and document data analysis, it was found that the foundation SLs relay information regarding critical fundraising activities, support needed, and performance results to customer and stakeholder groups through the foundation's website, blogs, and word of mouth. Although these communication methods are useful in the current environment, financial growth requires deliberate communications; thus, using IMC strategies that skillfully coordinate messages and communication channels to influence and engage a targeted audience is essential for growth in the nonprofit environment. Šerić (2017), strategic integration and marketing communication channels and methods can create a maximum communication effect. The client organization's SLs use *e-mail*, websites, blogs, social media, direct mailings, and annual reports to communicate with current customers and volunteers. This multichannel interactive communication drives positive results showing an increased number of recurring donors in the last 5 years and a slight increase in attendance to the special events, as seen in Table 7.

Furthermore, the foundation's SLs invested in new website design to engage with donors and volunteers, ensure transparency, post events schedules for volunteers, provide avenues for donation, and arrange for guidance to research institutions. According to Participant A, visitors to the website are current customers and stakeholder looking for information on activities or grant processes. However, with the change in website design displaying a clear and consistent message regarding the foundation's MVV, brand, financial transparency, and results, the website traffic should increase.

Additionally, the foundation's ED sought marketing expertise to revise and build the foundations MVV to further emotionally connect with donors to improve communications with stakeholders. With this help, the ED revised and proposed new and improved MVV with a positioning statement submitted to the board in 2019 and awaiting approval (Figure 13). The positioning statement was added to show how Foundation X is unique in the marketplace by entirely targeting the grant funds toward innovative, cutting-edge research opportunities.

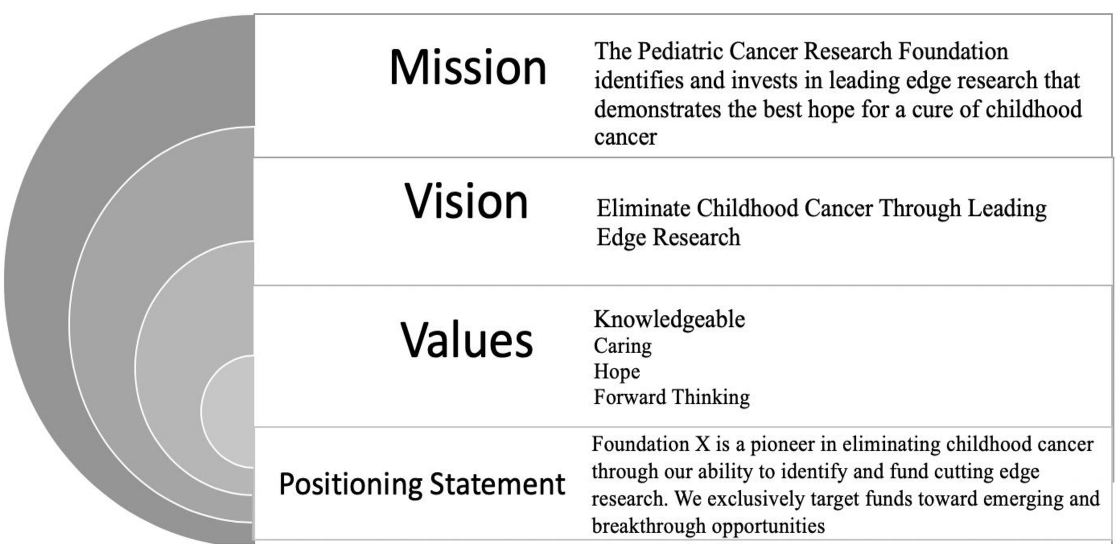

Figure 13. 2019 Proposed MVV and positioning statement. This figure illustrates a revised MVV designed to show Foundation X’s unique status in the marketplace.

The foundation’s SLs communication with staff and board members through weekly, monthly, and annual strategy meetings, as well as annual reviews and evaluations. Participants B and C stated, “the foundation's ED’s open-door policy allows for free and open interaction with employees, volunteers, and board members.” Furthermore, the ED’s participation in the monthly BOD, executive committee, and strategy planning meetings bridge the gap between staff operations and strategy while informing and accessing BOD expertise when needed. All the participating SLs agreed that effective communication strategies should be a holistic approach to reach all internal and external stakeholders; however, resource limitations hinder the ability to follow-up and cultivate most relationships.

The data gathered through assessment interviews using the Baldrige Framework in Section 3.1 Customer Engagement showed, all Foundation X participating SLs affirmed the need for effective external communication strategies to reach and recruit new donors. Turner (2017) explained that IMC strategies allow leaders to develop reliable messages to influence customers to view of the company, product, or service offering in a positive way. Nonprofit leaders seeking to influence customer loyalty and improve external communications effectiveness at the lowest cost may benefit from using IMC strategies and methods to identify, engage, and purposefully target new donors. A customer’s loyalty may depend upon the reliability of messages; therefore, nonprofit leaders can use IMC methods to improve customer relationships.

Foundation X currently relies on *e-mail*, website, direct mail, blogs, and use of personal interactions for two-way communication at campaigns and special events to build relationships with current and potential customers. The multichannel IMC synergistic approach enables businesses to reach donors of all generations as technology integrates into society. By IMC elements such as reliable messaging will target new donors to listen and act on marketing promotions. Furthermore, external communication strategies are vital in attracting new customers and vital to maintaining donor relationships.

The external communication strategies using IMC methods could potentially become a source for gaining competitive advantage for nonprofit leaders. Business leaders using IMC strategies may increase product exposure from using various channels, boosting brand awareness, enhancing emotional and social connections with donors, and capturing the attention of new donors (Larya & Reilly, 2018). Ewing et al. (2017) asserted that IMC strategies align organization goals and marketing communications activities to ensure an organization’s brand message is reliable and guarantees consistency, which may influence the foundation's performance. As such, I recommend Foundation X SLs, add external communication strategies to the annual strategic planning retreat agenda, as implementing IMC methods will provide nonprofit SLs with tools to potentially increase the effectiveness of campaigns. An expanded agenda may lead to improved fundraising performance and the achievement of more relevant messaging and channel use, suitable to target audiences at a reduced cost.

Process opportunities. After reviewing and analyzing the participant transcripts and collected data, it was clear that from the Baldrige Framework element 2.2, (a) key work processes and (b) using data to analyze performance are opportunities for improvement. According to Participants A, B, and C interview responses in Baldrige Framework Element 6.1, the foundation's limited resources and a multitude of responsibilities make it challenging to set priorities and drive a strategic plan agenda; thus, identifying key work process management as an opportunity for improvement for the foundation. Although external communications to attract new donors is not on the strategic plan agenda, the client leaders noted that implementing effective external strategies to attract new donors is a priority; yet, the resource constraints limit focused activity toward this goal. The development of external communications as a key work process for staff and volunteers centered around IMC elements of consistent messages and relationship building through two-way interactive communications.

An analysis of the interview data revealed the current approach to key work process management centers around the ED, relying on the employee job descriptions and trusting employee experience. This rule applies to old and new staff members to perform the expected roles for key processes of the organization; however, there are not any documented work processes for training position roles and responsibilities or for other employees to reference if needed. Thus, operations are more reactive with a lack of repeatability for evaluating the effectiveness of improving processes. The client workforce is small and often uses long-time volunteers without job descriptions to manage fundraising events based on experience.

Additionally, in many cases, the paid staff members perform their own and other key process tasks to fill gaps when resources are limited. Therefore, employees are expected to have access to and understand other functions beyond their job description.

Additionally, SLs reported they are over-tasked with supporting the growing organization, and there is little time for workforce development, measurement, and performance improvements and even less time and resources allotted for the execution of meeting the strategic objectives necessary to be successful. SLs can assist in efficiency and effectiveness of resources and key work process management by applying effective communications using IMC methods and channels to enable staff and volunteers can access job responsibilities and training when filling in for an unknown position. IMC methods can improve the reliability of communicating key processes requirements during staff shortages internally and externally, for example, posting resources needs and vacancies on the website or *e-mailing* targeted trusted experienced volunteers to assist when there are shortages.

Fundraising methods are the critical processes of raising funds necessary for the execution of the mission and future sustainability of a nonprofit organization (Hommerová & Severová, 2019). An alternative to using only job descriptions that may give the benefit the flexibility for resource challenges is to develop a set of documenting key work processes. The documented key work process for communicating all primary and secondary staff assignments, daily activities, external communications, fundraising support processes, and financial management processes to achieve fundraising outcomes and provide data for process improvements. This effort should include developing, documenting, and communicating volunteer and employee roles and responsibilities, develop training presentations for key roles, setting priorities and targets for each staff position, and evaluating results. Participant B stated, “the foundation relies on good people doing good things." Consequently, unclear roles make it hard for the workforce to know the evaluation criteria and understand how to be most effective. If the work force must take on tasks outside their job description, it is difficult for an organization with few employees to create formal processes. However, the SLs noted the foundation's operations are in constant motion, and they consistently struggle with limited resources. By documenting procedures and training for key processes allows for SLs to communicate job responsibilities and leadership expectations consistently to any staff member or volunteer. Additionally, I recommend applying communications strategies to key work processes to align the foundation's message and expectations when approaching new donors, potentially relieving the resource limitations by trusting the workforce is building relationships with old and new donors.

Documenting and communicating key work processes is essential to provide continuity of operations and give SLs assurance of task accuracy and completion. Key work processes are critical to success, they require most of the workforce, and support value creation; hence, managing key work process can provide nonprofit SLs with the flexibility needed in a resource-deprived environment. An investment in documenting key work processes will assist SLs in providing workforce autonomy, improving trust, and saving time, thereby increasing the organization's operational efficiency, helping to identify process improvements, and driving less management oversight.

Another area identified and an opportunity for improvement is using operational data to improve performance for in Baldrige Framework Element 6.1 Product and Process Improvement. Leaders can use data to measure key processes performance to provide the organization with focus, motivate employees, aid decision making, and propel improvements to performance. Interview data analyzed from Baldrige Framework Element 6.1 revealed Participant B shared that the foundation collects the data but has little awareness of how the data can be used to influence processes and goals. The SLs described the performance information collected to include financial inflows, the number of new families and corporate donors, and the amount of employee giving, as well as attendance levels, volunteer support, and customer feedback. However, the data is not used to measure performance, nor is it shared throughout the entire organization to understand organization health or conduct a comparative analysis. Performance data communicated internally can help leaders understand what processes are working and what processes need adjustments to improve operational performance. External communications with a strategic IMC mix of elements capitalizing on synergies to influence will create competition and influence customers and stakeholders through communicating positive performance results and trends.

Participant A claimed the ED has high-level data to track and improve performance; however, I was unable to locate any measurement or metric data evidence through data sources and collection efforts. Participant A further stated, “performance measurement is the staff member's responsibility and should set individual team metrics for the distinct fundraising support processes.” The project and staff level use data and should develop performance metrics; however, the data should be rolled up to measure process effectiveness and overall foundation performance (Prentice, 2017). Performance management metrics can drive the direction and strategy of the organization.

Nonprofit leaders can assess the product and key process activity performance using performance metrics as indicators that give insight into what is working and what is not. Transparency is vital to nonprofit organizations, analyzing, processing, and communicating data is essential to internal and external customers. Understanding what the donation allocations and providing measurable performance data are critical in promoting trust; therefore, external communication strategies can use IMC elements to convey performance results and show improvements. Performance metrics give business leaders and employees insight regarding whether company objectives are being meet or how well workers are completing tasks (Crane, Koch, & Wei, 2018). Metrics are created from real data and formulate a picture of the well-being of a campaign of operations. It may be useful to measure the following areas: revenue, expenses, resources, volunteers, donors, process time, and the number of grants. According to Prentice (2017), the process to establish a performance metric includes the following:

1. Identify vital processes/customer requirements
2. Identifying exact, measurable work product
3. Develop target goals against which scored results

The exact metrics differ from organization to organization; metrics are essential and must measure the real success of an organization in achieving its mission. As a starting point, to establish a measurement system, leaders must clearly understand how customers and stakeholders will judge activities (Prentice, 2017). Nonprofit leaders adopting a performance metrics program may benefit from focusing the data collected from critical process efficiency and effectiveness, and customer needs to improve processes; thereby, increasing financial stability.

Results strengths. After reviewing and analyzing the participant transcripts and collected data, the third theme to emerge from the results strength category from Baldrige Framework Element 7.5 is t the foundation's organizational budget cost control processes, as indicated in the declining trend in expenses (Figure 12). The interview data in Baldrige Framework Element 7.5, uncovered success of budget cost control processes when the organization was able to make 2019 grant commitments based on the money in the bank versus making grant commitments and needing to raise funds to meet the obligations. According to Participant A, the main component of nonprofit financial sustainability is the sound management of the annual budget. The discipline required to control costs is a positive data point for donors to form trust and loyalty to and organization. The foundation proved to have sensible and practical budget processes. Communicating the value and successes of the organization's budget processes is vital to gain donor support. Developing external communication strategies as part of a strategic planning effort that uses IMC methods to promote the foundation's successes to potential customers may assist in new donor recruitment.

The yearly strategic retreat is where the client's organizational staff and board members plan for income and expenses in the future by creating an annual budget. The BOD, SLs, and staff establish the proposed budget plan using historical data and new goals and present the budget to the full board for approval and adoption. The SLs are committed to financial management processes that included thorough reviews of financial reports and strict cost control measures. The participants claim the approved annual budget then serves as a guide for business activities and is reviewed a minimum of six times a year. Although rare, budget change requests can be submitted, but they require a clear and relevant justification to gain BOD approval. This measure shows that cost control is a priority to Foundation X's SLs.

The foundation's SLs have a clear vision, realistic expectations, and sound budgets, with overhead expenses close to the public's ideal of 23 cents per dollar. Senior leadership participants reported that the ED strictly balances the costs of overhead support against the mission objectives. With a keen eye for achieving mission objectives, the foundation SLs spend wisely and identify the most beneficial initiatives or investments, such as the Proposal Central database and a new website that can drop costs or provide the most substantial ROI. Another useful strategy Foundation X SLs use to control costs is to outsource short term tasks, as using part-time or donated resources saves time and costs while not overburdening resources with less skill and capacity.

Results opportunities. After reviewing and analyzing the participant transcripts and collected data, the last theme emerged as results opportunities from the Baldrige Excellence Framework Element 7.2. A clear issue identified by Participant A is the lack of business development strategies. Business development strategies for nonprofit organizations provide leaders the ability to identify partnerships, attract corporate donors to build mutual beneficial lasting relationships. After reviewing the data, Foundation X SLs may leverage performance opportunities by creating a business development strategy. The strategies should aim to target corporate donors and for-profit corporations through business partnerships using external communication strategies, with IMC methods, to appeal to the desire of for-profit businesses. To grow the organization, SLs must identify ways to increase donor support, and effective external communications is a crucial factor in influencing decisions. To target new business partnerships using effective external communications, leaders should develop ways that appeal to a targeted audience, use the appropriate channels, and ensure message reliability. External communications, combined with purposefully developing a relationship with business owners, will create a partner relationship.

According to Álvarez-González, García-Rodríguez, Rey-García, and Sanzo-Perez (2017), for-profit organizations are gaining a competitive edge using CSR strategies that improve society through volunteerism and charitable giving. An alternative business development strategy to gain new donor support may be to aim for creating a strategic alliance with a for-profit business partner to form a mutually beneficial business partnership. Business development strategies may guarantee donor and volunteer support from the for-profit business and visibility for the success of the for-profit business CSR strategy fulfillment. The foundation’s SLs top goal is to increase its revenue by nearly 50 percent in 4 years from 2.9 million dollars in 2017 to 5.1 million dollars in 2021; hence, building for-profit partnerships may assist in attracting new donors and achieving financial stability.

Businesses use CSR strategies to promote social good utilizing the principle of the triple bottom line in the areas of economic, social, and environmental advocacy to affect change in the world (McKeever & Redmund, 2018). I recommend those nonprofit leaders to gain an understanding of for-profit CSR strategies and reach out to for-profit businesses as a target market segment. Through effective external communications using IMC methods may influence for-profit businesses seeking a nonprofit partnership to gain a competitive edge and achieve the desire to improve society through charitable giving. Nonprofit leaders can connect and appeal to potential partners through consistent brand messaging using multiple channel interactive communications to reach new donors and encourage the establishment of mutually beneficial relationships. Nonprofit leaders should use external IMC strategies with the additional elements of business development techniques that help to identify, engage, and purposefully target large corporations and businesses seeking to balance profit-making objectives and actions with activities that improve society.

Project Summary

Some nonprofit organizations depend on individual donations to achieve mission goals. According to Lin and Wang (2016), 40% of nonprofit leaders did not meet the financial capacity needed to achieve mission goals during the 2008-2009 economic downturn. Some nonprofit organizations depend on individual donations to achieve mission goals. Data collected for this qualitative single case study revealed information to help answer the primary research question: What effective external communication strategies did nonprofit senior leaders use to attract new donors? Using the Baldrige Excellence Framework (BPEP, 2018), semistructured interviews, and document analysis, I gathered data that may be used to assist nonprofit leaders in developing and implementing strategies to effectively communicate with external stakeholders and attract new donors to increase revenue.

The Baldrige Excellence Framework structure aided in analyzing the organization holistically and identifying underlying strengths and weaknesses that could impact or shape the results of this study. The key themes that arose from the data analysis include (a) leadership, strategy development, and customer engagement; (b) key process management and using organizational data to evaluate performance; (c) budget cost control processes; and (d) business development strategies.

Communication is vital to business health and performance (Dulewski, & Jarosławska-Sobór, 2018). According to Leipnitz and Sundermann (2019), the nonprofit marketplace is growing, and donors receive direct mailings from various organizations. Thereby, creating a competitive environment; thus, effective external communication strategies using IMC methods may provide nonprofit organizations a competitive advantage at a low cost. Nonprofit leaders may use the results of this study to develop effective external communication strategies using IMC methods to optimize their organization's performance and achieve financial stability.

IMC strategies can aid in creating a distinctive appeal that targets new donors at all levels. Crawford and Jackson (2019) emphasized that nonprofit organizations should market themselves to potential donors just as rigorous as for-profit businesses promote and market product offering to customers. As such, IMC methods can be used to create effective external communications strategies focusing on consistent messaging, targeting customers, and choosing the appropriate channels to attract new donors. Creating a clear brand message, consistent across all channels and targeted at specific donor groups is critical to maintaining and gaining support from donors.

Contribution and Recommendations

Application to Professional Practice

Nonprofit communications with stakeholders are essential to fundraising activities and the pursuance of new donors to meet revenue goals. Fundraising is a critical function for nonprofit organizations that motivates people to do good (Hommerová & Severová, 2019). According to participants, the current methods for pursuing new donors lack a strategic focus and priority. Therefore, the results of this study can be useful in the development of effective external communication strategies to attract new donors to achieve more significant financial support to reach the 2021 goal of raising 5.1 million dollars.

According to participant interview data, the foundation’s nonprofit strategic planning often revolves around the annual revenue budget and is essential to meet the current goals and objectives for the organization. However, nonprofit leaders must plan for growth beyond the current year. Vallaster and von Wallpach (2018) explained that nonprofit business strategies must include building relationships with committed donors to maintain a competitive edge. Including external communications strategies as a significant component of the short- and long-term business strategy to ensure there is a focus on attracting new donors and building relationships with stakeholders needed for nonprofit survivability.

Combining new and traditional methods of marketing and advertising may provide nonprofit leaders with a meaningful, low-cost way to build a two-way external communications network centered on the mission, brand advocacy, performance, and relationship building. With the use of the Internet and technology, there are many new ways to reach and attract potential new supporters (Leardini, Moggi, & Rossi, 2019). With rising competition in the nonprofit sector, knowing the target audiences' age, culture, environment, and economic status will help nonprofits to understand the communication touchpoints needed to develop effective external communications strategies.

Nonprofit leaders can apply the results of this study in professional practice and create flexible, cost-effective external communication strategies aimed at new donors. Fundraising activities and successes drive the mission for most nonprofit organizations. Nonprofits should focus on external communications to establish and cultivate stakeholder relationships to expand the mission. Additionally, nonprofit leaders can benefit from developing for-profit partnerships by combining promotion efforts into one campaign and creating a support network through employee giving programs to assist with for-profit CSR outcomes while realizing the benefits of shared marketing and resource fulfillment. Partnerships that combined marketing communications reduces costs and mitigates nonprofit resource challenges while increasing the sources of revenue to improve financial capacity to sustain their mission (Beer & Micheli, 2017).

For efficiency, Foundation X leaders should make business development strategies as a component of the overall external communication strategy. Business development techniques should be more focused on creating partnerships with large corporations and for-profit businesses seeking CSR strategies. According to Dong and Rim (2019), various donor sources can be identified and developed through nonprofit business partnerships to increase growth. Creating a partnership with for-profit businesses will allow the foundations to deploy a consistent message through partner channels targeting a new segment of donors with communications about activities and successes through associations. The IMC approach gives nonprofit leaders the flexibility to strategically manage the vital elements needed for a successful external communications strategy to achieve long-term goals.

Recommendations for Action

This study includes many vital elements needed for nonprofit leaders to develop effective external communication strategies to attract new donors. The study also revealed IMC methods for inclusion in external communications strategies to ensure consistent, reliable messages, targeted donor communication groups, and the use of traditional and new channels to reach all demographics, would be useful. All nonprofit organizations focus on a social mission that aims to serve through community donor support. To achieve future goals, Foundation X SLs must find ways to attract new donors.

Communication is a vital component to the success of a nonprofit business because it is intended to intentionally or instinctively try to influence decisions (Andrade Gabrich & Souza Sales, 2016). More specifically, external communication messages aimed at stimulating and facilitating the awareness of customers and stakeholders to persuade buying decisions and is a tool used by business leaders seeking improved performance and growth. Nonprofit businesses suffer from insufficient resources and rely on external communications to inform and influence donors; thus, making effective external communication strategies vital to mission success. Companies rely on external communications to promote brand image, create awareness, and influence action. The findings of this study are intended to provide Foundation X SLs effective external communication strategies to attract new donors, create positive relationships, and accomplish their mission.

It is a recommendation that the Foundation SLs develop an external communication plan focused on attracting new donors using IMC strategies and methods. The plan should target using the IMC elements such as the hierarchy of marketing communication effects, brand, communication touchpoints to reach target consumers, clear and consistent messages across channels, design messages for implementation, and measure the effectiveness of messaging through feedback. Finding a unique mix of IMC elements using old and new channels to attract new donors specifically may create the synergy to increase messaging and influence donor decisions. Additionally, external communications must become a priority to the entire organization. External communication as a component of the foundation’s overall strategic planning agenda may ensure that attracting new donors will receive the focused attention required and demonstrate that it is a high priority for the organization.

Another area for an opportunity that SLs may consider is using external IMC strategies with additional elements of business development techniques. Business development techniques center on large corporations and for-profit businesses seeking to balance profit-making objectives and actions with activities that improve society. Nonprofit leaders can benefit from developing for-profit partnerships by combining promotion efforts into one campaign and creating a support network through employee giving programs. Partnerships that combine marketing communications for campaigns and activities may reduce costs and mitigate resource challenges while increasing the sources of revenue to improve the financial capacity to sustain their mission.

After the study, I will disseminate results to the client organization and local nonprofits businesses, in the academic literature, and through publication research journals. The finding of this study may encourage strategic and cost-effective external communication strategies to improve donor support for nonprofit businesses. Additional ways in which I may distribute the results of this study are through training and conferences.

Implications for Social Change

The implications for social change include the potential to offer nonprofit leaders' effective solutions that affect change to assure the sustainability and growth of the organization, to enable mission success, and to improve the lives of the communities they serve. Through the approaches found, the results of this study may provide nonprofit leaders the tools to develop effective extremal communication strategies to attract and influence new donor support. Attracting new donors and influencing support structures may provide the foundation with increased financial capital, improve volunteer support, and develop word of mouth advocacy to enhance the organization’s mission; thereby, enabling more innovative research for quality of life improvements and eventually a cure for childhood cancer.

Recommendations for Further Research

This study is limited by the Walden University consulting capstone requirements. The selected organization was limited to southern California, the provision of using the Baldrige Excellence Framework, the small sample size, and the findings may not represent the complete picture of an effective nonprofit leader’s communication strategies, making it difficult to generalize the results of this study. The value of this study is that it is one of the first studies to advocate the use of IMC for nonprofit organizations. Researchers following the topic may want to conduct a case study using different nonprofit sectors in various geographical locations or with multiple nonprofit organizations with a large sample of participants to provide the ability to generalize the findings. I recommend additional studies to understand the implementation challenges associated with IMC and its effect on nonprofit organizations. Additionally, research using qualitative and quantitative methods could provide in-depth knowledge of effective external communication strategies that nonprofit leaders can use to attract new donors. The results of this study may prove useful to others when disseminated within the academic and professional communities.

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Appendix: Interview Protocol

Phone Interview

Date and time:

Participant: Senior Leader Participant #_____

Rules of Engagement:

- All interviews are confidential.
- All interviews were recorded and transcribed for data collection.
- Interviewees can request a copy of the recording and/or transcript at any time.
- All data is stored in a secure office environment.
- Interviewees may choose to not answer a question or stop the interview at any time.

Introduction and state the topic of the interview:

Baldrige Framework area:

_____ Organizational Profile

_____1: Leadership

_____ 2: Strategy

_____ 3: Customers

_____ 4: Measurement/Processes

_____ 5: Workforce

_____ 6: Operations

_____7: Results

Data collection and note taking:

Other Topics Discussed:

Documents Requested:

Post Interview Comments or Leads: