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## Strategies to Sustain Funding in the Nonprofit Sector

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# Walden University

College of Management and Technology

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Mark Sami

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Walden University  
2020

Abstract

Strategies to Sustain Funding in the Nonprofit Sector

by

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MS, University of London, 2014

BS, University of Guyana, 1999

Doctoral Study Submitted in Partial Fulfillment

of the Requirements for the Degree of

Doctor of Business Administration

Walden University

April 2020

## Abstract

Nonprofits provide much needed services to communities, especially to the poor and vulnerable population, but the majority are operating in an environment of uncertainty because of scarcity of resources. It is imperative that nonprofit managers implement strategies to ensure the sustainability of their organizations. Grounded in the general systems theory, the purpose of this qualitative multiple case study was to explore strategies that nonprofit managers use to sustain funding in the nonprofit sector. The study participants were 3 nonprofit managers, including 2 from the Caribbean, and 1 from the United States. Data were collected from semistructured interviews and a review of organizational documents. Yin's 5-step process was used to analyze the data. Three major themes emerged from data: effectiveness and accountability, relationship with partners, and revenue diversification. The implications for positive social change include the potential for nonprofit managers to use the successful strategies to sustain their operations, thus improving the well-being and standard of living of residents of the communities in which they operate.

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## Dedication

All that I have accomplished during my time on this earth would not be possible without the protection, provision, and presence of the lord almighty. Thank you, lord, for your strength as I leave my life in your hands to guide me. I would not have completed this DBA journey without the love and support of my wife Robeta to whom I would like to dedicate my dissertation. Thank you, my love, for your constant encouragement and inspiration. I would also like to dedicate this dissertation to my son who is due within the next two months and who I look forward to spending lots of time with. I would also like to thank my parents Ronald and Selina for their constant encouragement and unwavering support.

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I would also like to thank the nonprofit managers who participated in my study. Thank you for your willingness, openness, and frankness, which allowed me to adequately address my research question. Thank you also to the millions of nonprofit leaders and staff who tirelessly work to improve the standard of living in communities.

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## Section 1: Foundation of the Study

The services that workers of nonprofit organizations provide are essential to many communities in improving the standard of living of their people. Nonprofits play a major role in community services, workforce development, and emergency response, and their role is ever increasing in communities (Smith & Phillips, 2016). Moreover, the importance of nonprofits to economies ranges from 0.12% of Gross Domestic Product (GDP) in Mexico to 4.95% of GDP in the Netherlands. Nonprofits in developing and developed countries are prone to failure (Cheuk, Nichol, Tinggi, & Hla, 2018); nonetheless, some leaders of nonprofits have implemented strategies to remain sustainable. An understanding of the strategies that successful nonprofit managers implement to remain sustainable may help struggling nonprofits in their quest for sustainability.

### **Background of the Problem**

Nonprofit organizations have commonly been known as the *third sector* and are critical to the provision of essential social services to communities in the United States. Nonprofits have a greater presence in developing countries with weaker economies that lack basic governmental services. Nonprofit staff provide services in the areas of health and human services among others and are the least developed of the three existing sectors: public, private, and nonprofits (Chikoto & Neely, 2014). The problem surrounding nonprofits lie in the fact that the conventional business model of current nonprofits will not be sustainable with the current financial trend. Regarding nonprofits, sustainability is viewed as a framework to ensure the long-term survival of people,

profits, and the environment (Waite, 2014). Michaelidou, Micevski, and Cadogan (2015) also stated that leaders of nonprofits face problems in sourcing income as a result of reductions in charitable funding by government and private corporations.

The problem is also compounded by the fact that nonprofit leaders do not have access to capital as private organizations do and are negatively impacted by changes in the policies of governments, which are their large contributors. Although countries have ceased feeling the negative effects of the economic recession since 2012, the majority of nonprofits are operating in an environment of uncertainty and skepticism resulting from the scarcity of resources. Managers of nonprofits need to develop strategies that will lead to the sustainability of their organizations to continue the provision of critical social services.

### **Problem Statement**

Nonprofit organizations face problems in sourcing funding because of reductions in charitable funding by government and private corporations (Michaelidou et al., 2015; Topaloglu, McDonald, & Hunt, 2018). According to the 2014 state of the sector survey of more than 5000 nonprofits, only 55% of nonprofits had cash reserves to operate for more than 3 months and 28% finished 2013 with a deficit (McDonald et al., 2015). In addition, based on U.S Government projections, charitable giving will decrease by 4.5% in 2017, which is equivalent to US\$26 billion (Abramson & Salamon, 2016). The general business problem is that some managers of nonprofit organizations are being negatively affected by dwindling sources of funds, resulting in the inability of nonprofits to provide critical

social services to communities. The specific business problem is that some nonprofit managers lack strategies to sustain funding in the nonprofit sector.

### **Purpose Statement**

The purpose of this qualitative multiple case study is to explore strategies that nonprofit managers use to sustain funding in the nonprofit sector. The target population will be at least three managers of successful nonprofit organizations in the United States and the Caribbean, whose strategies have resulted in sustainable funding. The implications for positive social change include the potential for struggling nonprofit organizations to become sustainable. Nonprofit sustainability may improve the availability of crucial social services to communities within the United States and the Caribbean. In addition, the survival of nonprofits may lead to more employment for youth in the community, an overall improvement in living standards, and encourage economic growth.

### **Nature of the Study**

Qualitative studies are appropriate for research in the area of strategic management and for the exploration of various potential theories (Gaya & Smith, 2016). Because I have based my research on the strategies that nonprofit managers use to sustain funding, a qualitative approach will be more suitable than quantitative method because, as stated by Hashimov (2014), qualitative studies are appropriate when researchers want to determine how things work. Further, Marshall and Rossman (2010) stated that qualitative studies assess actions in a natural setting and Maxwell (2013) stated that qualitative methods enable researchers to investigate the actions taken by participants,

which further confirms the suitability of qualitative method. Researchers use quantitative methods to focus on quantifiable data to determine interconnections (Wahyuni, 2012), but because the aim of my research is to investigate business strategies, quantitative methods will not be suitable for this study. Mixed-method studies incorporate both qualitative and quantitative approaches (Bernard, 2013) and because I decided against the quantitative approach, a mixed-method study would not be appropriate.

I chose a multiple case study design for this research because I will gather data via interviews and review of documentation and using the case study approach will enable me to further elaborate on questions and follow up on any responses as needed. Yin (2009) posited that case study designs are relevant when *how* and *why* questions need to be answered within a natural setting. I will use the case study design for this research because it was the most appropriate design to explore strategies for sustaining funding in the nonprofit sector. In addition, Yin (2014) stated that employing a case study design also enables researchers to gain an in-depth understanding of circumstances through interviews and the analysis of other sources of information, which will be suitable for my study. I did not select a phenomenological research design because by using this design, researchers focus on perceptions and beliefs (Terra & Passador, 2015), which was not appropriate for this study. I also considered grounded theory for this research which, as posited by Johnson (2015), enables the researcher to discover theories from data collected. However, as previously mentioned, because the aim of the research is to identify successful strategies and not to establish theories, a case study design is appropriate.

### **Research Question**

The overarching research question for this study is: What strategies do nonprofit managers use to sustain funding in the nonprofit sector?

### **Interview Questions**

1. What strategies do you use to sustain funding?
2. What process did you follow to develop strategies?
3. What elements were critical for your organization in the implementation of the sustainable strategies?
4. What were some of the obstacles that you faced in implementing sustainability strategies.
5. What process did you use to overcome the obstacles?
6. How do you evaluate the effectiveness of your sustainability strategies?
7. How often do you review your sustainability strategies?
8. What would you like to add that would further my knowledge with regard to sustainability strategies?

### **Conceptual Framework**

The framework for this qualitative case study is the systems theory (von Bertalanffy, 1972). The systems theory was coined orally in the 1930's in various publications after the second world war (von Bertalanffy, 1972). Adams, Hester, Bradley, Meyers, and Keating (2014) defined systems theory as propositions which are analyzed to derive a better understanding of a system as a collection of integrated units. The key units of the systems theory include inputs, processes, outputs, and outcomes (Dominici &



Levanti, 2011). Dominici and Levanti (2011) posited that the creators of systems theory based it on the premise that all things have common characteristics and those characteristics can be better analyzed when categorized. Systems theory is also useful for identifying collaborations that leaders of nonprofits in various sectors can consider for becoming more efficient while assisting each other towards the goal of sustainability based on shared values, roles, and cooperation (Caws, 2015).

The systems theory is most appropriate for this research as it allows the exploration of effective strategies based on the experiences of successful nonprofits that have remained sustainable in the face of reduced funding. As the units of a system are dependent on each other, the use of systems theory will also allow me to discover strategies successful nonprofits use to promote financial sustainability and foster collaboration. Viewing nonprofit sustainability through the lens of general systems theory could also enable me to view and understand successful sustainability strategies of the subject organizations within the nonprofit sector, to provide social services to communities in need.

### **Operational Definitions**

*Corporate social responsibility:* Incorporating a responsible and ethical attitude towards stakeholders and the environment, instead of only promoting organizational interest (Ahmad, 2012).

*Financial sustainability:* The process of ensuring that resources are not exhausted but are maintained and preserved for use in future periods (Lourenço, Callen, Branco, & Curto, 2014)

*For profit organization:* According to the Internal Revenue Service (IRS) of the United States Government, a for profit organization is one that operates to benefit private persons or entities (IRS, 2017).

*Nonprofit organization (NPO):* A nonprofit is an organization that is incorporated similar to that of a for-profit organization with the main difference being that nonprofits are not focused on making a profit, but rather to execute social missions in the communities that they serve (Sanders & McClellan, 2014). The IRS, categorizes nonprofits in 32 categories with the most popular being 501(c)(3) organizations which include religious, charitable, and educational organizations (IRS, 2017). In the Caribbean, nonprofit organizations are also called civil society organizations (CSO) or community-based organizations (CBO), and they operate to ensure the social development of the general public.

*Organizational culture:* The values, beliefs, and actions of an organization that governs the behavior of its members (Kochan, 2013).

*Social enterprise:* An organization whose purpose is to execute charitable missions while employing market strategies (Ebrahim, Batillana, & Mair, 2014).

*Sustainability:* The ability of leaders to fulfill their obligations to stakeholders while preserving their financial, social and environmental function (Searcy & Buslovich, 2014).

*Third sector:* Includes the majority of charities, community groups, and social enterprises (Hodges & Howieson, 2017).

### **Assumptions, Limitations, and Delimitations**

This section presents the assumptions, limitations, and delimitations affecting the study, which will be informed by my experiences as the main research instrument and the perspectives of the participants that I will interview. I will make assumptions that I consider to be reasonable, based on the research problem, design, and conceptual framework. The limitations are potential areas of weaknesses that could affect the study, while I will use delimitations to set the boundaries of the study.

#### **Assumptions**

The nature of doctoral studies is such that researchers would need to make assumptions to draw reasonable conclusions that may not be verifiable. According to Merriam (2014), assumptions are events beyond the control of the researcher but are required for an adequate study. Assumptions are also presumptions that the researcher regard as true for research purposes (Kirkwood & Price, 2013, Leedy & Ormrod, 2015). I make three assumptions that impact the study, the first being that the interviewees will answer my questions honestly and to the best of their knowledge. Because I will select a sample of three nonprofit managers, secondly, I assume that the sample is sufficient to provide information about the strategies that nonprofit managers use to foster sustainability in the sector. With regard to sustainability strategies, my last assumption is that nonprofit managers are best suited to explain and have the required knowledge of the strategies that the chosen nonprofits use to ensure sustainability.

## **Limitations**

Because I will base a major aspect of this research on participants' responses to research questions, there are obvious limitations in the study. Limitations in qualitative studies are inherent biases that could affect the responses of participants, which could have a negative impact on the study (Wright et al., 2014). I anticipate three limitations for this study, the foremost being the limitation of time, which was insufficient given that I am a full-time employee with a very demanding job. The second limitation relates to my choice to interview three nonprofit managers, a number which may not be insufficient to gather enough relevant data on nonprofit sustainability strategies, given that there are thousands of nonprofits in the United States and the Caribbean. The final limitation relates to the geographic scope of the study. Because the three nonprofits that I chose were from the United States and the Caribbean, the results of the study may not apply to other nonprofits in other parts of the globe.

## **Delimitations**

Because they exercise control over the study, researchers use delimitations to shape the scope of the study. In the execution of the study, I use delimitations that are under my control to set the boundaries of the study, including the start and end points (Marshall & Rossman, 2016; Yin, 2014), and there were two sets of delimitations in addition to general delimitations such as the conceptual framework, scope, and research questions. The first delimitation is the leadership position held by targeted participants. There are many paid and volunteer workers at various levels in nonprofit organizations, however, I will obtain information from managers because they were the ones that are

best positioned to provide information with regard to successful strategies that leaders of their organizations have used to promote sustainability.

The second delimitation is the geographical location of the participating nonprofits, which were taken from the United States and the Caribbean. These are delimitations because in expanding the participant base to other global nonprofits, I could encounter a language barrier as well as different cultural norms which could change the dimension of the study.

### **Significance of the Study**

#### **Contribution to Business Practice**

The fundamental requirement for the survival of any organization is to be able to obtain and maintain its resources. One of the most critical resources, especially for nonprofits, is its financial resources, which allow nonprofits to survive and grow (Lin & Wang, 2016). Lin and Wang (2016) further stated that nonprofits' financial resources are directly related to their ability to remain sustainable and those that encounter a reduction in financial capacity have no choice but to scale back on the services that they provide. When managers of nonprofits reduce the scope of the services, they are not offering much-needed social services to communities, which is an unwelcomed situation. Fyall (2016) highlighted the elevated risk of using nonprofits to provide social services because they are highly dependent on external funding and a lack of funding can have a negative effect on social services.

By proposing sustainability strategies that nonprofit managers can adopt, in addition to existing nonprofits, those that are in the initial set-up phases can have a model

to follow so that sustainability issues may not surface. The fact that nonprofit leaders can be in control of their sustainability, can lead to better planning and execution of social projects which will enable managers to be prepared for any negative shocks that may arise in the future, thus resulting in effective operations. According to Kahnweiler (2013), employees of nonprofits are not motivated by salaries but by their contribution to social services. However, by being sustainable, nonprofits will be in a position to recruit better qualified and skilled staff, which can lead to effective and efficient operations.

### **Implications for Social Change**

By remaining sustainable, staff of nonprofits are able to continue providing services to communities in which they operate (Brooke, 2012). Hanney and Hills (2011) stated that a large number of persons turned to nonprofits for essential social services during the worldwide economic downturn. In addition, most public services are now provided by nonprofit staff through contracts with the Governments. (Gajdova & Majduchova, 2018; Word & Park, 2015). Therefore, if I can highlight successful sustainability strategies, other similar nonprofits could use or modify the strategies to remain sustainable and continue to function to service communities. I will concentrate my research upon nonprofits in the United States and the Caribbean, but the findings from the study could benefit other nonprofit organizations, especially in low-income countries, where there is a great need for social services.

### **A Review of the Professional and Academic Literature**

In this literature review, I start firstly with a critical analysis and synthesis of the various sources used for the research, which would underscore the substantial amount of

time taken to review a large number of case studies, journals, and other scholarly work. Next is an explanation of the organization of the literature review, an overview of the literature review strategy, followed by the organization of the study. I then provide a succinct explanation of the purpose, services, and responsibilities of nonprofits, followed by an explanation of the sustainability issues facing nonprofits. The review is organized to demonstrate financial as well as nonfinancial strategies that managers can implement for sustainability, based on the review of the literature.

The purpose of this research is to investigate the strategies that nonprofit managers have used to remain sustainable in an environment of reduced funding, especially from government sources, as well as in the presence of fierce competition from other nonprofits. Based on the main research question, I reviewed the scholarly literature with regard to sustainable strategies that nonprofit managers have implemented to foster sustainability in their organization. The main question incorporated into the research was: What strategies do nonprofit managers use to sustain funding in the nonprofit sector? The research question was relevant because knowledge of the strategies that successful managers use could aid other managers in understanding the steps that can be taken to foster sustainability.

The literature review includes reviews of articles relating to nonprofit sustainability of organizations in the United States as well as other global organizations. The literature review returned articles in peer-reviewed academic journals, nonprofit professional publications, which I obtained primarily from the Walden Library.

## **Organization of the Review**

The review of the professional and academic literature with regard to nonprofits includes matters relating to nonprofit sustainability, leadership, performance, practices, and awareness. I approached the study by discussing literature with regard to the purpose of nonprofits, the services they provide, and their responsibilities, followed by a review of themes. Recognizing that sustainability strategies do not only relate to financial strength, the review focuses on financial as well as nonfinancial measures that managers have taken to foster sustainability.

The conceptual framework that I used in this research paper is systems theory, whereby managers can use the successful strategies adopted by successful managers, whether financial or nonfinancial to boost the sustainability of their organization. I will further demonstrate that nonprofits are all connected by one large system and will show that the actions of one can have an impact on another. In addition, sustainable strategies lead to an increased ability to attract revenue, but many managers do not have experience in implementing those strategies (Vacekova, Valentinov, & Nemeč, 2017). By learning from successful managers, those managers whose organization may be struggling to attain sustainability, will have a benchmark to follow in their quest for sustainability.

## **Literature Review Strategy**

I approached the literature search by obtaining information primarily from peer-reviewed journals to derive strategies that were proven and passed the scrutiny of experts in the field of nonprofits. Keywords in searches included *nonprofit sustainability*, *sustainability strategies*, *nonprofit management*, *nonprofit sustainability*, *strategic*



*planning*, and *nonprofit diversification*, from various business, management, and academic databases such as Business source complete, ABI/INFORM collection, ScienceDirect, Emerald Insight, Google Scholar, and Sage Journals, which produced over 500 sources to choose from, but I only selected 230 for the literature review, of which 33 or 14% were prior to the year 2015 and more than 90% of the sources were peer-reviewed. I also created alerts from the Business Source Complete database which proved to be very useful in retrieving articles in the theme of nonprofit sustainability.

### **Purpose of the Review**

All organizations, including nonprofits, begin operations with the intention of being in existence for some foreseeable time, however, this is not always possible. Sustainability is the ability to maintain the provision of services after funding has ceased (Abercrombie, Devchand, Naron, Osborn, & Sawatzki, 2017). Further, many authors have shown that nonprofits can quickly attract financing to promote sustainability when they have been operating for some time, are operating efficiently, and direct spending on fundraising purposes (Harris & Ruth, 2015). However, not all nonprofits can afford to spend monies on fundraising and not all would have been in operation for lengthy periods, which leads to concerns about long-term sustainability.

Nonprofits are vital to communities and countries as a whole because of the spectrum of services that they provide (Brown, 2017; Burde, Rosenfeld, & Sheaffer, 2017; Valentov & Vacekova, 2015) and there has been increased demand for the services that nonprofits provide (Dobrai & Farkas, 2016). Leaders of nonprofits enhance the welfare of communities because they provide services that are needed, but in some

economies, not provided by governments. Moreover, nonprofit personnel provide services to all sectors of communities including minorities that may not have otherwise had access to essential services (Kim & Mason, 2018). In addition, Langer and LeRoux (2017) stated that nonprofits are vital to the promotion of civil society in communities, while Jolles, Collins-Camargo, McBeath, Bunger, and Chuang (2017) stated that because of budget constraints affecting government entities, it is common for them to contract nonprofits to provide services in the area of human services. The use of nonprofits results in more effective service provision at a lower cost, emphasizing the importance of nonprofits as a very important tool for the advancement of economies and the improvement of living standards.

In economic terms, nonprofits are also very important as they represent almost 10% of total wages in the United States economy (Bright, 2016). In addition, in 2013, nonprofits contributed US\$910 billion to the United States economy (McKeever, 2015). In some cases, nonprofits also act as a channel of communication between Governments and citizens due to their better understanding of social issues, thereby bridging the gap between politicians and the people that they represent (Kim & Mason, 2018; Mason, 2016), and there are also nonprofits in the advocacy arena whose mission is to influence policy changes (Fyall, 2017; Mason, 2016; Munoz Marques, 2015). Managers of nonprofits have a tremendous responsibility to safeguard the sustainability of their organization so that nonprofit organizations can ensure a better standard of living for those in the communities in which they operate.

Because nonprofit workers are versed in the needs of communities, Governments use their skills and knowledge to provide services to the public. Brown (2017), as well as Word and Park (2015) posited that most public services are now provided by nonprofits through contracts with the government to provide such services. Lam and McDougle (2016) further elaborated that in some cases, nonprofits are the main instruments for the provision of social and welfare services in lesser-developed communities. Lee (2017) also found that the majority of nonprofits that promote human services are in lower-income neighborhoods. Because social services are in such great demand, especially by less affluent citizens, the partnership between Governments and nonprofits is critical in ensuring financial viability and sustainability of nonprofits.

All managers strive to ensure that their organization is financially viable. The financial health of organizations is a major indicator of its ability to execute social programs and the financial strength of nonprofits depends on the success of projects (Kim, 2017; Lam & McDougle, 2016). Nonprofits are; therefore, financially sound and flexible when there are no vulnerabilities that could impede their ability to exist and financially stable when there are no impediments to their ability to procure financial resources (Beaton & Hwang, 2017). Nonprofit managers will need to have not only managerial competencies but also financial management skills to push their organization towards the level of sustainability that will secure stability.

The question that leaders of nonprofits also have to consider is: What level of sustainability they will strive to achieve? Nonprofit financial health is a long-term process and can be measured on a scale with strong and weak financial health at the ends

of the scale and stable financial health in the middle (Prentice, 2015). The needs of nonprofits, or managers' perception of the desired end of the scale, will depend on the aims of nonprofit and the timeframe in which they plan to execute programs (Bowman, 2011). A large number of nonprofit leaders will; therefore, strive to be in the middle of the scale whereby they will be in a stable financial position.

### **Systems Theory**

Systems theory was defined by Von Bertalanffy (1972) as the study of various systems and the integration of the various parts of the systems to create a working whole. From his background in biology, Von Bertalanffy began studying complex systems and their relationships (Von Bertalanffy, 1968). Moreover, Teece (2018) stated that systems theory emerged and evolved from various research streams in the areas of biology by Von Bertalanffy, cybernetics by Wiener, Economics by Boulding, and mathematics by Rapaport. Cadenas and Arnold (2015) stated that Von Bertalanffy applied sociology which he previously used in the study of living organisms, in his development of systems theory. In addition, Von Bertalanffy (1968) stated that the intention behind the creation of systems theory was to provide the most efficient means of achieving goals. Because nonprofit managers perform their operations with sustainability in mind, systems theory is applicable to managers in their quest to boost efficiency.

Understanding and distinguishing the key tenets of general systems theory could enable researchers to derive an understanding of how successful organizations implement systems to promote sustainability. Von Bertalanffy (1972) highlighted open and closed systems as core tenets of general systems theory. Sayin (2016) stated that in open

systems, there is interaction between the internal elements and the external elements. Thus, open systems allow exchanges in information so managers of a nonprofits can derive information from the entire nonprofit sector. However, in closed systems, there is no interaction between the internal and external elements (Chemiat & Kiptum, 2017), so a closed system would not allow managers to obtain information regarding possible sustainable strategies.

Further, systems theory is critical to the understanding of systems because an understanding of how the collection of integrated and interacting units operate, can result in understanding an entire system (Adams, Hester, Bradley, Meyers, & Keating, 2014). Further, Yawson (2013) stated that systems theory is the most relevant theory to develop an understanding of systems while Caws (2015) stated that systems theory enables researchers to study the correlation between various systems and their parts. Moreover, in an earlier work, Tucker, Cullen, Sinclair, and Wakeland (2005) found that the application of systems theory allowed leaders of social organizations to assess alternative strategies to boost the effectiveness of their operations. Using the systems theory dynamic, the exploration of successful strategies that nonprofit managers have implemented to remain sustainable in the face of reduced funding can provide a basis for other nonprofits to emulate.

Because there are many nonprofits that execute similar types of activities and interact with each other through various means of collaboration, systems theory can provide a template for more efficient operations and execution of mandates. Integrated systems need to have the ability to adapt to changing environments to remain sustainable

(George, 2017); therefore, systems theory is appropriate in reviewing the steps taken by successful managers, which managers of struggling nonprofits can emulate. Further Carlisle (2015) stated that an understanding of the various parts of a system results in the development of flexible strategies for the generation of funding, which is very applicable to nonprofit organizations.

**Application of systems theory.** Managers and other organizational leaders use systems theory to analyze real-world problems in order to determine best approaches to the resolution of those problems (Adams et al., 2014; Brooks, 2015). Gandy (2015) applied systems theory to the operations of small business owners in terms of the profitability of their operations and found that small business owners were all part of a system that strive for sustainable operations. Further, with a system view in mind, Sayin (2016) stated that leaders use systems theory to assess the interactions between the various tenets of a system to gain a better understanding.

Within the constraints of systems theory, Strong (2018) also explored sustainability strategies that airport managers can implement to increase revenue from nonaeronautical sources. Strong applied systems theory to examine the interaction between various operational aspects of airports and found that managers have to be aware that they operate under tremendous challenges, which requires a full understanding of how various aspects function to maximize revenue potential. Bridgen (2017) further assessed systems from a holistic point of view and found that it was critical that organizations determine their strengths and weaknesses. An assessment of strength and

weaknesses will be a critical component of organizations, as leaders strive for sustainability of operations.

It is imperative that managers have a clear understanding of the operating environment in which they exist. In applying systems theory, Moore et al. (2018) stated that managers need to fully appreciate that there is a system of interconnectedness within the operating environment and understanding that interconnectedness will lead to internal adjustments, which can promote sustainability. Sartore-Baldwin and McCullough (2018) also applied systems theory and found that there was an interconnectedness between humans and the environment and concluded that organizations can incorporate environmental management practices into their operations to contribute to a healthier environment. Similar to nonprofits, if managers have a clear assessment of the environment they operate in, especially with regard to funding, they will be able to put steps in place to cater for any unexpected changes to promote sustainability in their organization.

Because a major aspect of systems theory is as an assessment of parts of a system in relation to the system as a whole, the application of system theory can assist managers in their assessment of how efficiently their organization is serving the needs of communities. Kharji (2018) applied systems theory to determine whether rehabilitation programs were efficiently providing services with regard to disabled populations. By looking at the various players who provide services to disabled persons, Kharji was able to conclude that there was a major deficiency in the quality of service offered. This application of systems theory is also relevant to nonprofits whereby managers can

perform internal evaluations to determine whether they are providing services to communities in need, as efficiently as they should. Further, managers can also apply systems theory to analyze the work of similar nonprofits within the system of nonprofits to see how their nonprofit compares in terms of the efficiency and effectiveness of service delivery to needful populations.

To further elaborate the importance of systems thinking to sustainability, Waller, Fawcett and Johnson (2015) conducted a study on the importance of logistics efficiency to sustainability. Waller, Fawcett and Johnson found that by applying systems thinking to operations, organizational leaders, realizing that they are part of system, can share information with each other which can boost performance and enable sustainability. Gabriel, Birsch and Menrad (2016) also applied systems theory to analyze family-run enterprises and found that knowledge of internal structures as part of a whole can boost managers' knowledge of interrelations, allowing them to better manage complexities in their operations. The studies clearly demonstrate that when organizational leaders realize that they are part of a larger system, they can take advantage of opportunities for collaboration to improve performance.

Another example of the use of systems theory in research relates to its application in the analysis of social systems. Kuch (2017) assessed whether ecological sustainability was connected to the proximity of organizations and found through the lens of systems theory, that there are numerous economic, ecological, and social factors affecting sustainability and managers need to develop strategies to deal with such factors. Further, Kuch found that there was a great similarity in the challenges that organizations face as



well as strong interconnectedness between organizations. In addition, systems theory is useful in understanding how the various components within an organization interact with each other to assist managers in developing the appropriate strategies (Valentyna & Oksana, 2016). The application of systems theory in this case will be applicable to nonprofits to assess interconnectedness and similarity in challenges faced.

Another instance of researchers applying systems theory to research was in the evaluation of stakeholder engagement. Slack, Corlett and Morris (2015) used a systems approach to review ways in which organizations engage stakeholders and found that when leaders direct all facets of the organization towards the needs of stakeholders, there was improvement in performance and sustainability. Moreover, Hassmiller, Urban, Frerichs and Dave (2017) applied a systems approach to their research and found that it assisted in the engagement of stakeholders through efficient structuring and prioritization. Given that stakeholders, whether those in need or those that provide funding, are of utmost importance to nonprofits, the application of systems theory relating to stakeholders will be critical in fostering sustainability.

The application of systems theory is also suitable to analyze human behavior in different circumstances. By using systems theory, Ženko, Mulej, and Potočan (2017) assessed the reactions and behavior of various classes of people during crises and found that persons with influence do not make decisions that are socially responsible, which sometimes lead to crises. Further Ženko et al. concluded that, in the construct of systems theory, humankind have to adopt a new set of values which would benefit all of humankind instead of just a few. The application of systems theory in this case will be

relevant to nonprofit managers in that, they need to direct the social work of their nonprofit to benefit as much of those in need as possible, which can impact their ability to remain sustainable.

Because the majority of nonprofits provide a service to the public in various communities, the application of systems theory can assist managers in determining the effectiveness of their operations. Gordon, Butler, Cooper, Waitt, and Magee (2018) used systems theory to determine the effectiveness of a social campaign and concluded that in marketing, organizations cannot target persons at the individual level only, but also at the community and policy levels. Applying systems theory, Brychkov and Domegan (2017) also concluded that social marketers do not consider the broader society and cultural differences when developing marketing strategies. Managers of nonprofits can; therefore, use systems theory to develop their overall strategy to target persons in need at the individual, community and policy levels, considering the many facets of systems and how they are all interconnected.

Managers can also a systems theory perspective to improve organizational performance. Hamidi (2018) employed systems theory to assess whether organizations were adequately addressing human resource development (HRD) needs in small and medium sized enterprises in developing countries. Hamidi found that organizations only considered a narrow set of perspectives and did not consider the basic components of systems such as inputs, processes, outputs and feedback. Hamidi further concluded that HRD was part of a larger system within organizations and managers can use HRD to shape their organizations into efficient operating entities.

Researchers have also used systems theory to assess effective strategies to implement Enterprise resource planning (ERP) systems within organizations. Barr (2013) concluded that leaders of organizations are realizing the importance of integrating all of their operations into one manageable system through Information Technology (IT) applications. Investments by organizations in ERP systems also improve organizations' competitiveness and performance so managers should carefully choose the most appropriate system for their organizations (Firouzabadi & Mehrizi, 2015). Simon and Noblet (2012) also stated that ERP systems leads to a reduction in costs and increased efficiency.

Because there are various nonprofits that provide disaster relief after major natural disasters, the application of systems theory could also be relevant in promoting efficiency in the work of those organizations, especially through partnerships. Quarshie and Leuschner (2018) applied systems theory to assess the system of preparedness after natural disasters. Quarshie and Leuschner looked at the interconnectedness and interactions among the various supporters during disasters with the aim of promoting better coordination and effectiveness. By applying systems theory, Bryson et al. (2015) further found that partnerships yielded tangible as well as intangible benefits while Stadtler (2016) found that those benefits could be short-term as well as long-term.

Researchers have applied systems theory to better understand the environment in which nonprofits operate and its effect on operations. Mobus (2017) applied a systems theory framework to assess the sustainability of human social systems, realizing that it was a part of a larger earth system. Mobus concluded that there are numerous small

systems that need to work together to achieve their purposes so the entire system can function and remain sustainable. Mobus also found that sustainability of systems also depends on the users' ability to adapt to changing circumstances to remain viable, which can be relevant to managers of nonprofits in terms of adapting to changing economic circumstances. Mellert, Scherbaum, Oliveira, and Wilke (2015) also concluded that organizations change to remain competitive and change could also result in the organization achieving an economic advantage over others. Furthermore, if organizations want to remain competitive, they need to consider change (Kilkelly, 2014).

Banson, Nguyen, and Bosch (2018) applied systems theory on the sustainability of the agricultural sector by recognizing that the sector is very complex and required a holistic approach in assessing its sustainability. Banson et al. found that it was important to analyze the interaction among the various components in the sector to determine what are the causes of exploitation of resources and what strategies managers need to implement for survival and growth. It is imperative that nonprofit managers properly manage stakeholders to give their firms an advantage over others. Stressing that nonprofits operate in an environment of immense competition, Dodd (2016) applied systems theory to investigate the importance of public relations to their viability. Dodd found that public relations is the social capital of nonprofits and is just as important as other forms of capital. In addition, organizations that adequately manage their relationship with stakeholders will be more successful (Pressgrove, 2017).

Recognizing the importance of partnerships to the success of nonprofits, Starnes (2015) applied the systems theory framework to research and found that managers need

to establish alliances to be competitive within their operating environment. Starnes also concluded that many leaders make the error of only concentrating on the operational aspect of their organization and do not apply a systematic view to look at all aspects of their organization. As such, nonprofit managers need to adopt a systems approach to view their organization with the task of acquiring inputs which they process then discharge as services to communities (Starnes, 2015).

An important aspect of any organization is the mindset or perspectives of its workforce. Baruch, Szucs, and Gunz (2015) used systems theory to consider the behaviors and experiences of individuals born in different generations and found that they had different views with regard to maintaining employment with one organization. Tourangeau, Wong, Saari, and Patterson (2015) also concluded, by applying systems theory that mature workers are more committed to their organizations than younger workers. Tourangeau et al. further concluded that the younger generation of workers are more likely to leave the organization if managers burden them with heavy workloads.

Nonprofit managers need all of the possible tools at their disposal to ensure successful execution of activities in communities. By adopting a systems theory perspective, Tarhini, Ammar, and Tarhini (2015) found that managers need to pay attention to critical success factors to guarantee the success of projects, especially with regard to the implementation of new systems. Further, Eason (2014) concluded that organizational systems can be very complex resulting in employees being unsure of their roles, thus leading to lack of productivity.

Researchers also used systems theory to assess techniques that managers can use to ensure that their organization is resilient enough to deal with unexpected shocks. Carlisle (2015) stressed that resilience is a critical feature for managers to develop to foster an in-depth understanding of the various elements of a system, which will allow them to deal with negative shocks. Managers also need to foster change at the organization level by being creative and plan for uncertainties (Popa, Guillermin, & Dedeurwaerdere, 2015). Another example of researchers using systems theory to assess management techniques was a study by Jules (2017) on diversity. Jules found that leaders of nonprofits need to develop managers who can work in diverse environments, especially given that some nonprofits operate in various parts of the world and with many different cultures.

Researchers also used systems theory to explore strategies to enhance project success. Adoko, Mazzuchi, and Sarkani (2015) stated that projects are becoming more complex and as a result, managers need to employ better planning, coordination, and supervision to meet project deliverables. Monitoring and evaluation also plays an important part in project success whereby managers can obtain the perspectives of various project stakeholders to determine whether the project satisfied its intended target groups (Williams, Ashill, Naumann, & Jackson, 2015).

Given the importance of risk management within organizations, researchers have also applied a systems theory perspective to explore strategies to identify risk in projects. In the early stages of the project design process, Whitney, Bradley, Baugh, and

Chesterman (2015) found that systems theory was useful to dictate the design of projects to eliminate risk at the onset. Further, Lee and Green (2015) posited that managers use systems theory to fully understand all of the variables that relate to their operations.

### **Alternative Theories**

As an alternative to systems theory, researchers have used other theories such as stewardship theory and resource dependency theory to analyze organizations and the steps taken towards sustainability. Under stewardship theory, managers have overarching control over organizations and should provide direction to officers of the organization (Donaldson & Davis, 1991). The main premise of stewardship theory is that agents or directors of organizations will forego their personal interests and will act to protect the best interests of their organizations (Keay, 2017). Stewardship theory is applicable to nonprofits because members usually join nonprofits not for personal gains but to provide a service to needful communities. By applying stewardship theory, Aßländer, Roloff, and Nayır (2016) found that Chief executive officers (CEOs) set the targets and work plans for their organizations and ensure that officers perform work satisfactorily. Furthermore, Bacq and Eddleston (2018) found that social enterprises operate under tremendous challenges and by adopting a stewardship theory approach, managers will be able to effectively engage stakeholders to attract increased support, whether from the Government or other sources.

Stewardship theory also encompasses the mindset of organizational leaders. Bacq, Janssen, and Kickul (2016) concluded that unlike other theories such as agency theory whereby leaders see the organization's goal as being social or financial, stewardship

theory encompasses both financial and social goals which allows for greater achievement of objectives. Asheghi-Oskooee and Mazloomi (2018) also concluded that the adoption of stewardship theory by leaders results in improved performance.

Resource dependency theory encompasses the fact that nonprofits are highly dependent on Government and other forms of philanthropic funding to execute activities. Further, resource dependency theory proposes that the survival of organizations is dependent on the ability of leaders to obtain resources from external sources (Klein & Pereira, 2016). Willem and Coopman (2016) also posited that resource dependency theory requires effective relationships within organizations when leaders are faced with scarcity of resources. Moreover, Murphy and Robichau (2016) stated that the number of nonprofits increased in direct correlation with increases in funding by government for social services and further found that many nonprofits considered the Government to be their largest contributor of funding.

Starik and Kanashiro (2013) stated that the use of recent theories by researchers proves less challenging than the use of older theories. Although stewardship theory and resource dependency theory are all recent strategies, systems theory was more appropriate for this research as it allows the exploration of effective strategies based on the experiences of successful nonprofits in the entire system of nonprofits. Teece (2018) stated that although its creators developed systems theory applications in the 1980's, it is still relevant in today's business environment, in providing a complete view of business processes. As the units of a system are dependent on each other, the use of systems theory



will also allow me to discover strategies successful nonprofits use to promote financial sustainability and foster collaboration.

### **Services Provided by Nonprofits**

Nonprofits provide critical services to communities that are sometimes not available or available on a small scale. Nonprofits provide services through partnerships with donors (McCallum, Schmid, & Price, 2013) and the work of nonprofits is especially important due to persistent weak worldwide economic conditions as was evident in the economic recession of 2009 whereby there was a great dependence on Nonprofits for critical services (Balcik, Iravani, & Smilowitz, 2014; Davoudi & Rawson, 2010; Randle, 2013). Despite the many challenges that nonprofits face, managers need to formulate ways to sustain their organizations to continue providing critical services. Managers of nonprofits have an immense responsibility to work within existing challenges to provide services to communities, and many nonprofits also aim to improve living conditions within communities and wider economies through infrastructural projects (Diaz-Sarachaga, Jato-Espino, & Castro-Fresno, 2017).

Resources, internal capabilities, collaboration, and legitimacy are all necessary for the development and success of social enterprises and the sustainability of social enterprises is critical to nonprofit organizations' ability to have a positive impact on communities. Park and Kim (2016) noted that managers could put their nonprofit in an advantageous position by ensuring efficiencies in the way they structure the organization. Some organizational structures promote smooth operations while some are so burdensome and cumbersome that they promote inefficiency. Managers need to;

therefore, put a lot of thought into the structure of nonprofits, especially in the initial or set-up phases of the organization.

Nonprofit managers need to have a clear understanding of what services their nonprofit currently provides, or are planning to provide in the case of newly established nonprofits. In the development phase, there are different thought processes in different countries including the five macro-institutional forces as described by the Kerlin model for the forming the model of social enterprises (Fisac & Moreno-Romero, 2015). Omorede (2014) concluded that the main motivation behind the startup of social enterprises was to achieve social gains and further posited that individuals' intentional mindset and the need for the services in countries are the main contributing factors to the creation of social enterprises. A critical aspect of nonprofit managers' functions is to; therefore, match available funding sources to the area of concentration of their nonprofit.

Generally, there is a range of factors that affect the operations of social enterprises including governmental, financial, organizational, and social matters (Young & Kim, 2015) which managers of nonprofits have to be cognizant of during the formulation and execution phases of the nonprofit. Melao, Guia, and Amorim (2016) also added that a sizeable number of consultations occur during the creation of social enterprises and that the analysis of target populations feature the most during the establishment of such social enterprises. Considering the needs of the target population ensures that the services that nonprofits provide is needed and relevant for the communities in which they operate.

## **Responsibility of Nonprofits**

In understanding nonprofits and their purposes, it is important to understand the thought process behind the establishment of nonprofits and other social enterprises. Feiler, Wicker, and Breuer (2015) characterized nonprofits as organizations that provide public services but operate privately while Sanders & McClellan (2014) stated that nonprofits have similar operational and financial structures to that of for-profit organizations. However, nonprofit leaders are not concerned with the profit incentive, but rather to provide much needed social services to communities. Therefore, most nonprofits see themselves as contributing to the greater good instead of just earning revenue, which aids in promoting the work of the nonprofit, thus gaining recognition within communities.

Regarding sustainability, public perception is critical to the ability of nonprofits to access and maintain support from government and other donors. As a result, nonprofits must be cognizant of how the public view them, including how nonprofits support the environment through sustainability assessments and reporting, which provides nonprofits with the opportunity to highlight to the public and donors that they have the interest of the environment at heart (Betsill & Bulkeley, 2013; Jones & Mucha, 2014). In addition, accessibility and transparency assist tremendously in the raising of financial resources and leads to improvement in overall performance because there will be more confidence in the nonprofit (Lopez-Arceiz, Pèrezgrueso, & Torres, 2017). Relationships with stakeholders are; therefore, extremely critical to nonprofits organizations achieving their economic and social goals.

Because of changing business environment worldwide, nonprofits also need to adapt to remain relevant and practical. Young and Kim (2015) applied resilience theory to determine why social enterprises stick to their original form and purpose and also to determine what would make them consider a change. Young and Kim found that although social enterprises have a goal that they are working towards, they are operating in an environment of limited resources which means that managers might be forced to consider minor changes in the way that their organization operates, including the services that they provide. However, sound governance and leadership among other qualities, lead to stability within social enterprises (National Council of Nonprofits, 2014). As such, Managers need to demonstrate flexibility in their operations to be able to make subtle changes when economic circumstance change so that they will still be able to attract funding. As the organization demonstrates stability, confidence in the nonprofit will strengthen, which will further result in attracting additional funding for social services.

The more managers and staff of nonprofit realize that they are there to serve communities and its citizens, the more they will be trusted and supported. Norris-Tirrell, Rinella, and Pham (2018) stated that nonprofits have a responsibility to the public that they serve and are critical to a free and active society. Similarly, Appelbaum, Calcagno, Magarelli, and Saliba (2016) examined the relationship between organizations and the public at large regarding the effects of organizational change initiatives on that relationship and found that change initiatives affect the relationship between the organization and the public, which was important as sustainability issues affect the ability of organizations to interact with society aptly. Further, Fifka et al. (2016) stated that

sustainability for nonprofits should not only entail emphasis upon remaining in operation but being able to have a meaningful impact on communities and the environment.

Nonprofit leaders who undertake sustainability initiatives should; therefore, have a clear idea of the change processes so that the organization will have a chance of being successful.

### **Sustainability Risk Facing Nonprofits and Their Causes**

As economic conditions deteriorate, especially in lesser developed and developing countries, the need for nonprofits will continue to increase. Nonprofits are continually operating on larger scales as the need for services continue to rise, with annual earnings of US\$1.5 trillion and total assets of US\$3 trillion (Powers & Yaros, 2013). Despite the substantial earnings, donors are contributing fewer amounts every year (Koenig, 2015) resulting in nonprofits facing a major challenge in the execution of their duties.

According to statistics from the Association of Fundraising Professionals (2015), for every \$100 of new donor contributions received, nonprofits are losing \$103. To maintain sustainability, managers of nonprofits should assess the risks associated with their operations and take the necessary steps to mitigate those risks.

There is; therefore, a great need for managers, to implement measures to manage risks of all types, especially the risk of a reduction in funding from donors. Most nonprofit managers are mostly concerned with the financial risk facing their organizations (Domanski, 2016), Managers need to identify, assess, and prevent risk which results in better management practices and more efficient operations. However, financial risk should not be the only factor that managers consider as there are many

other types of risks that encompass their operations. Many organizations implement a risk register which identifies risks at all levels and all levels of staff provide information to populate the register. Possible strategies to minimize risk or mitigate risk and stimulate sustainability could include the development of more efficient business models as well as the creation of supplemental streams of revenue (Phelan, 2014). Conversely, managers should be careful not to suffocate their organizations with excessive risk management (Bowers & Khorakian, 2014) while ensuring that they stay true to their core responsibilities and values (Jensen, 2017).

In terms of risks, the extent of diverse services that nonprofits undertake, also results in their inability to properly plan for sustainability and survival. Arik, Clark, and Raffo (2016) concluded that nonprofits already have complex missions in carrying out social work, so striving for sustainability and accountability adds an extra burden on managers. Nonprofit leaders should, re-examine strategic planning to build capacity, foster sustainability, and the continuation of the provision of social services. Also, Samad, Arshad, Asat, and Kasim (2017) posited that many nonprofits face accountability issues and must learn to strike a balance between their responsibilities to communities and their responsibility to properly and adequately account for funds entrusted to them. In addition, Williams-Gray (2016) stated that by measuring their capacity, nonprofits could identify their weaknesses and accurately address them to build capacity.

With regard to attracting support, it is essential to have a good relationship with supporters and funders. Harris and Ruth (2015) stated that it is imperative that nonprofits implement policies to attract supporters to their cause and put the necessary steps in place

to maintain that support to be successful in the execution of their mission. However, nonprofits are usually found wanting in the areas of financial and economic management (Rinaldi, Parretti, Salimbeni, & Citti, 2015), which highlights the need for a suitably qualified management and supporting workforce within nonprofits. Moreover, Muda, Ridhuan, and Rachman (2016) stated that the investment that organizations make in their human resources is critical to promote and maintain sustainability and competitiveness. In addition, Barnes, Ponder, and Hopkins (2015), as well as Jerzak (2015) emphasized the fact that it is important that organizations take the necessary steps to develop the skills of their workforce to promote efficiency.

Although nonprofit managers make it their duty to pursue increased funding from donors, they should not be overly dependent on external sources. Nonprofits are increasingly at risk of being unsustainable because of their high reliance on philanthropic and government funding, whereby governmental support to nonprofit organizations comprise 11% of their total revenue (Krawczyk, Wooddell, & Dias, 2017). Managers need to; therefore, implement the relevant strategies to diversify their funding sources so the organization will be more sustainable and stable.

Because there is immense competition for philanthropic funding, managers need to be cognizant of what they require to maintain the support from donors. As such, it is vital that nonprofits not only concentrate on attracting donors to provide funding but to also ensure that they take the relevant steps to keep donors. On average, nonprofits are 65% more likely to receive funding from a previous donor compared to a 30% probability

of receiving from a new donor because the donor would have already expressed an interest in the work of the organization (Feng, 2014).

Because of the insecure environment within which nonprofits operate, another sustainability issue that befalls nonprofits is the high level of turnover within the industry. As such, with regard to capacity building, nonprofit managers should also continually reintroduce employees to the goals and values of the organization so that they can better serve their stakeholders (Brown, 2016). Kim (2015), as well as Brown (2016) further stated that values and mission statements are critical aspects of nonprofit management so leaders should be able to clearly articulate how the organization's vision and values direct its operations. It is also imperative that managers continually promote capacity building within their nonprofit. Castillo (2016) stated that an understanding of capacity building would enhance organizations' knowledge of various strategies which can improve their effectiveness and sustainability.

Further to economic and social factors, having a sound management structure in nonprofit organizations is also critical in fostering sustainability. Research has shown that only 23% of nonprofits plan for succession with the main reasons for neglect being a false sense of immortality and fear by current executives of a loss of organizational control and power (Santora, Sarros, Bozer, Esposito, & Bassi, 2015). As a result, leaders with the relevant skills are of utmost importance, especially in recognizing and mitigating against sustainability issues. Yazdani, Attafar, Shahin, and Kheradmandnia (2016) stressed the importance of total quality management (TQM) in nonprofits and posited that when managers implement TQM, it promotes internal learning and development by staff



members. Further, as long as staff members in the organization are satisfied, customer service will improve which will benefit the members of the community that the nonprofit is striving to serve (Masry, Hamido, & Hilaly, 2015).

Quality managers are difficult to find and many develop their skills through experience and education. Remington-Docette and Musgrove (2015) also investigated whether sustainability can be thought at the academic level so that students can take what they have learned and apply it to the nonprofit sector. However, based on research, not all of the competencies thought to students were fully developed in all of the students and there were various levels of development depending on gender and age (Remington-Docette & Musgrove, 2015).

Learning from the past is important, so managers of nonprofits have a responsibility to plan for their sustainability using proven strategies to continue operations. Gilstrap and Morris (2015) assessed the impact of strategic organizational development strategies on the success of nonprofits and stressed that nonprofits face problems with sustainability because they lack strategic methods in running their operations and; therefore, fail to stay afloat. Additionally, Mucai et al. (2014) concluded that many nonprofits had strategies for sustainability, but the strategies would take 2-4 years to implement, which may not be manageable or sustainable. Galpin, Joufflas, and Gasta (2014) investigated the impact of sustainable business practices on the revenue of a chosen organization and found that indeed, the fact that the organization adopted proper sustainable business practices, this led to an increase in revenue. Furthermore, sustainability practices, as demonstrated by Moyer, Sinclair, and Diduck (2014) can be

taught within nonprofits so that all officers will be on the same page to conform to the organization's environmental policy.

Although planning for sustainability is no easy task, there are options and resources available to nonprofits to aid in the planning process. Frick, Chapple, Mattiuzzi, and Zuk (2015) assessed how government-funded organizations in California plan for sustainability and noted that organizations across the United States of America (USA) had developed sustainability plans through assistance from the US government. Further Frick et al. (2015) concluded that different regions within the USA vary regarding the way that organizations collaborate and highlighted the fact that many of the organizations face structural challenges as they plan for sustainability.

Despite the lack of funding for many nonprofits and minimal budgets, nonprofits are still able to attract a high quality of staff and volunteers to assist in the provision of social services. York (2017) stated that within the United States, there are millions of volunteers that offer their services to nonprofits annually. In terms of what motivates managers and staff at other levels to work in the nonprofit sector, the motivations are intrinsic, not extrinsic values (Word & Park, 2015). Nevertheless, Sefora and Mihaela (2016) found that when managers work in collaboration with volunteers, there is a greater commitment by volunteers to completing tasks. Word and Park (2015) further found that managers were motivated by intrinsic values in their decisions to join nonprofits as well as other aspects such as a good balance between work and family life which is sometimes missing from for-profit organizations. Also, Roundy and Halstead (2016) stated that in

the creation of nonprofits, some of the main incentives of the principals are to fulfill their personal as well as religious beliefs, which are not profit motivated.

Another major factor affecting the sustainability of nonprofits lies in the financial regulations where the nonprofit is based, as it relates to external audits. Nonprofits, like for-profit organizations, should have annual audits on their financial accounts, in which the audit opinion should state whether the auditors believe that the nonprofit has any going concern problems (Feng, 2014). Having a favorable going concern report is critical to the survival of nonprofits because nonprofits which receive unfavorable going concern reports suffer a reduction on government grants (Feng, 2014). Reduction in government grants can severely affect the ability of the nonprofit to continue providing services to communities, because the negative report will question their ability to continue their mission. Nevertheless, Feng (2014) concluded that going concern reports have a negative impact on future government grants, but private donations and public support remains strong, whether the report was favorable or not.

### **Addressing Sustainability Through Financial Means**

**Financial diversity.** The common theme in most research that addresses the problem of nonprofit sustainability is financial diversity (Shea & Wang, 2016). Diversifying involves branching out into different services or providing minor variations to current services that the nonprofit offers, with the overall aim of making a surplus, thus increasing the organization's chances of being sustainable. Due to uncertainty with regard to sources of funding, having a diverse source of funds promotes sustainability within nonprofits (Amagoh, 2015). There are many factors, both internal and external that affect

decisions with regard to financing (Shea & Wang, 2016). Further, diversification brings additional challenges to nonprofits because principals have to abide by the wishes of those organizations that provide funding, which may lead to competing point of views and beliefs (Lin, Chang, Hou, & Chou, 2014). As such, the execution of nonprofits' social mission would be affected by competing point of views, which managers should consider.

To avoid the issue of a mismatch in views and beliefs, managers of nonprofits should always ensure that they select organizations that are a good fit for both organizations, to have smooth relations and the adequate provision of social services. In addition to finding a good fit, managers have to also ensure that the nonprofits are attractive to the organizations that they want to collaborate with. Paliwal (2013) demonstrated that older nonprofits that execute works which resounds with members of communities were more attractive to outsiders and are; therefore, better equipped to adopt financial diversification strategies as compared to younger organizations. With regard to diversity in funding, nonprofits should ideally receive funding from various sources to reduce risk, promote stability and foster growth (Wicker & Breuer, 2014). According to Von Schnurbein and Fritz (2017), nonprofits receive funding from four different sources including donations, fee-based, services, investments, and Government grants. Kearns, Bell, Deem, and McShane (2014) stated that diversity in funding sources would result in support from stakeholder communities and would result in the nonprofit appearing more legitimate. However, the nature of revenue sources of nonprofits will significantly depend on the type of service that they provide (Von Schnurbein & Fritz,

2017). Additional benefits of financial diversity include the limiting of risk and fostering sound partnerships with funders (Kearns et al., 2014).

**Use of financial tools.** Researchers have also proposed the use of financial tools such as indexing to determine the optimum measure of sustainability which will allow managers to know the ideal level that their organization should strive for. Bhanot and Bapat (2015) assessed the sustainability of organizations by investigating the financial aspects of sustainability. The authors also directed the study towards developing an index for sustainability that organizations could follow and concluded that sustainable organizations should have a sustainability index of between 0.26 and 0.8, and also concluded that factors such as gross loan portfolio, number of borrowers, and return on assets all contribute to the sustainability of the institutions. Nonprofit managers with financial backgrounds can; therefore, utilize financial tools to assist them in striving for sustainability. Managers that do not have the requisite knowledge or experience in the use of financial tools can seek assistance from those who do, or utilize other means of assessing optimal sustainability levels.

Risk is an important aspect of any business operation; therefore, managers need to implement adequate systems to mitigate organizational risk. Atkins (2015) applied multiple regression research strategy to determine the extent to which nonprofits can use modern portfolio theory and resource dependency theory to relieve their dependence on external funding and diversify their revenue base. In addition, nonprofits with various streams of revenue are more likely to remain sustainable and less likely to cut social programs and nonprofits with revenue diversification, are more likely to have higher

operating margins and a larger volume of net assets (Atkins, 2015). As such, if properly applied, risk management techniques can assist managers in determining the optimum level and sources of funding, whether from Governments, philanthropists or from borrowing.

**Financial partnerships and partnership with for-profits.** One option available to nonprofits is the collaboration with other entities that provide similar service, or those that want to support the work of the nonprofit. In terms of financial sustainability, Al-Tabbaa, Leach, and March (2014) stated that strategic partnerships with for-profit enterprises via nonprofit-business collaboration would be of benefit to both organizations. The benefit for-profit businesses will be the fostering or promotion of their social responsibility while the benefit to nonprofits will be new sources of income and new expertise in business operations. New sources of income and additional expertise will significantly promote sustainability in nonprofits which is the primary task of managers. Al-Tabbaa et al. further stated that that collaboration with for-profit organizations could lead to greater sustainability through reciprocal benefits to both nonprofit and business entities and recommended that nonprofits and business entities should have a shared objective of creating a positive social change which will lead to better collaboration and results.

Partnerships between nonprofits and for-profits can take various forms, with financial and technical assistance being the most popular. In addition, partnerships between can also take the form of nonprofits adopting the financial and administrative procedures of for-profits to enable a more robust method of operating (Coad & Guenther,

2014). It is a well-known fact that for-profit organizations are under more regulations than nonprofits and as a result, nonprofits can sometimes adopt loose procedures that undermine their credibility and attractiveness to investment. By adopting for-profit standards, nonprofits can show the public and other financiers that they are serious about accountability and good-practices, which may increase their chances of sourcing additional income or donor funding.

Nonprofits and private companies also partner to provide social services to the communities that they serve. The partnership is vital to pool the expertise of officers of both organizations to provide service of high quality. In addition, the integration is different and complementary which results in symmetric relations (Katz & Sasson, 2017). With regard to donations, having successful relationships with the corporate world could also lead to increased financial resources and boost sustainability. As posited by Drummer and Marshburn (2014), executives of private corporations donate up to 5% of their annual earnings to nonprofits which signifies the importance of strong relationships with the corporate world. Consequently, the fostering of cooperation between various organizations within communities lead to an environment of mutual dependence and support which leads to better communities (Kiron et al., 2015)

On the other hand, although the partnership with for-profit organizations does have its advantages, managers of nonprofits need to be aware of public perception surrounding the for-profit organization that it associates itself with. In addition, as nonprofits depend on donations to execute social work, they have to ensure that the citizens who they serve and donors who they depend on do not regard them as pursuing

commercial activities, which could affect donations (Feiler et al., 2015). As such, nonprofit managers will need to diligently conduct assessments of their for-profit partners to ensure that the partnership does not hurt the sustainability prospects of their organization.

**Fundraising.** Managers of nonprofits are responsible for developing and managing the funding portfolio of the organization. Fundraising is an essential tool that nonprofits use to obtain the resources that they need to fund their social missions (Kearns et al., 2014). Further, nonprofits in the United Kingdom raise close to 11 million Pounds Sterling annually through fundraising with 70% of the population providing support to charities (Sargeant & Shang, 2016). Managers need to; therefore, implement aggressive fundraising initiatives to obtain increased finances and enhance the chances of the nonprofit of becoming or remaining sustainable.

Effective financial management of resources is always critical to ensuring the success of organizations, especially nonprofits (Lam & McDougle, 2016). Financial management is extremely crucial for the sustainability of nonprofit organizations and it is critical that nonprofits remain adequately capitalized and funded so that there will be sufficient resources to support operations. Sloan, Grizzle, and Kim (2015) also noted the importance of having high operating reserves and posited that leadership experience and a stable source of revenue were the critical determinants of operating reserves. Having the capacity to manage financial resources is very different from the capacity to manage operations, so managers need to procure the relevant skills to adequately manage scarce resources or else there could be mismanagement or lack of accountability for funds.



It is critical that nonprofits realize that they are in competition for scarce donor resources and for managers to determine the nature of competition because nonprofits depend on donations for their survival and to fund their operations (Feiler et al., 2015; Fitzgerald, 2015). Moreover, Liao and Huang (2016) and Witmer and Mellinger (2016) stated that nonprofits operate in an environment of limited resources as well as in an environment of great competition with other nonprofits. As such, aggressive fundraising activities by nonprofits lead to a reduction of funding for other nonprofits because there is limited funding available (Beaton & Hwang, 2017).

One way of attracting funding from donors is by undertaking fundraising activities which lead to a positive impact on donations from philanthropic sources. Kang (2016) found that when nonprofits have a large concentration of volunteers, it enhances their ability to attract funding. However, it is also important that managers develop indicators of fundraising performance to assess the effectiveness of initiatives (Iwu, Kapondoro, Twum-Darko, & Tengeh, 2015) and to avoid wasting time on initiatives that do not produce the desired quantity of funds. Spending time on initiatives that are not effective may also take time away from members of the nonprofit which they could be using for social activities.

In cases where managers are not able to have sustained funding mechanisms, there are one-off opportunities for funding, especially the funding of capital projects that managers can pursue. Woronkowicz and Nicholson-Crotty (2017) highlighted the importance of capital campaigns whereby nonprofits are able to raise large amounts of funding for capital projects, funding which sometimes come at the expense of other

nonprofits that are also competing for funding. Nevertheless, Woronkowicz and Nicholson-Crotty also introduced the ecological approach which states that funding received by one organization does not necessarily affect sums that are available for other organization. As a result, capital campaigns by one organization may not affect others, especially those that offer specialized services. Whether their receipt of funding affects other nonprofits or not, managers should be fully aware that funding is critical to the sustainability of their nonprofit and; therefore, implement the relevant steps to increase their access to available government or philanthropic funding.

Even though fundraising is an effective means of obtaining financial resources, it is not always efficient or relevant to nonprofits. Lin and Wang (2016) stated that fundraising was not effective in boosting sustainability in times of recession. Therefore, nonprofit managers have to learn how to negotiate other sources of resources in times of recession to avoid becoming insolvent. Many nonprofits the world over have found that their ability to attract volunteers to their cause helps a great deal in easing their financial burden (Kang, 2016). Volunteers, in most cases, execute activities for no monetary return, which allows the nonprofit to provide social services without affecting their limited funding (Kang, 2016). Some developed and developing countries also have on-the-job training programs whereby governments fund trainees or “transit employees” who are attached to organizations, to develop the skills of the trainees (Cooney, Nyssens, O’Shaughnessy, & Defourny, 2016).

Because for-profit and nonprofit organizations have similar challenges, there are many funding instruments that for-profit organizations utilize to raise revenue which

managers of nonprofits can also consider using. Onishi (2015) stated that some nonprofits have been using funding instruments such as equity and loans to raise the funding needed to fund operations, also classified as venture philanthropy. However, with the move to venture philanthropy, investors usually require a presence in the organization through sitting on board or having other direct advisory roles. Nonprofit leaders have to; therefore, ensure that in moving to venture philanthropy, they are comfortable with outside influences in their operations. In spite of that, because the main target of nonprofits lie in their social missions, the financial aspects of operations can be regarded as of secondary importance (Onishi, 2015).

Another form of raising funds that has become popular within recent years in crowdfunding whereby organizations raise small sums of money from a large group of persons. The total value of funds raised via crowdfunding was in excess of 1.2 billion United States dollars in 2015 and the amount was expected to grow to 2 billion United States dollars in 2016 (CrowdExpert.Com. 2016, February 29). Further, Zhao, Chen, Want and Chen (2016) found that crowdfunding was very effective in raising funding for organizations with a success rate of 50%. Managers of nonprofits also have to be aware of the fact that many donors like to support projects and missions that others have supported in the past. In that regard, Kearns et al. (2014) stated that securing one funding source can attract other funders for the nonprofit and as a result, managers need to think strategically about how they approach and maintain the relationship with their funders, especially those with considerable influence in society.

## **Addressing Sustainability Through Nonfinancial Means**

**Characteristics of nonprofits.** Because there is major competition for financial resources from government and other philanthropic sources, nonprofits have to be aware of the characteristics that affect donations (Krawczyk, Wooddell, & Dias, 2017), which include reputation, efficiency, and fiscal health. Reputation is one of the most critical characteristics because governments and other donor entities will prefer to contribute to nonprofits that have a track record of providing services that are needed in communities efficiently and effectively, while at the same time being recognized by those the nonprofit serves. Further, the adoption of social entrepreneurial principals should improve sustainability and improve the capacity of management.

The nature of the nonprofit is also an important factor in fostering sustainability. Because the majority of nonprofit organizations promote social missions, there are others that are established to fight for a cause. In that regard, Botner, Mishra, and Mishra (2015) stated that nonprofits whose mission is to provide a social service are more likely to be sustainable and to attract long-term funding than those who are in conflict, or are defending a cause. Moreover, Joles et al. (2017) stated that government entities choose to provide funding to nonprofits based on their commitment to fulfilling the social needs of communities and not because of their causes. However, there are many different types of nonprofits the world over and managers will have to determine what donors are looking for to attract their support.

**Environmental policies.** Sustainability can manifest itself in many forms to permit nonprofits to continue providing services. Aragon-Correa, Martin-Tapia, and

Torre-Ruiz (2014) stated that by adopting an environmental policy, firms gain a competitive advantage by barring other firms that do not adopt sustainable practices from entry into communities, in addition to the obvious financial benefits. Lyakhov and Gliedt (2017) also concluded that some nonprofits promote sustainability by adopting environmental awareness in addition to pushing for changes in environmental policy and legislation. The use of renewable energy initiatives is also beneficial in impacting sustainability with regard to energy consumption, water usage, and carbon emissions (Grogan, 2010). It is; therefore, important that nonprofits incorporate environmental awareness into their practices before they are forced to do so. Bulkeley (2010) stated that some organizations integrate environmental awareness into their operations, only after pressure from stakeholders, so by being proactive in their approach, nonprofits can receive a lot of recognition and praise, which will go a long way to promote their work and make them attractive to donors.

Managers of some nonprofits have also taken the proactive step to internally review their sustainability procedures as it relates to the environment and other external factors. Because of growing sensitivity of the public to environmental and other sustainability issues, managers of nonprofits have a responsibility to ensure that they adopt sound practices to adequately protect the environment and to demonstrate the impact of their actions on the environment (Jones & Mucha, 2014). Authors have also analyzed the environmental issues affecting the sustainability of nonprofits in terms of the economic environment in which the nonprofit operates. Lam and McDougle (2016) and Shea and Wang (2016) stated that there are many factors including economic and

political factors which affect the survival of nonprofits and managers; therefore, need to implement the necessary initiatives to raise funding while being cognizant of the environmental factors surrounding their operations.

**Spreading of risks.** It is imperative for nonprofits to ensure that they spread the risk with regard to sources of income. Nonprofits receive funding from various and diverse sources including from Government grants, private organizations, and individuals (Feng, 2014; Kearns et al., 2014). As such, Gajdova and Majduchova (2018) stressed that organizations should try to source additional funding through fundraising and other forms of funding so that the organization would not be overly dependent on one source of funding, thus boosting sustainability. Nonprofits can also consider offering fee-based services to clients to earn additional income. However, nonprofits should obtain information about the financial capabilities of persons that can afford to pay for services that the nonprofit offers (Swierzy, Wicker, & Breuer, 2018).

**Relationship with stakeholders.** Stakeholders are an integral part of the work of nonprofits and include board members, donors, volunteers, and public officials (Mason, 2016). With regard to donors, when they provide funds to nonprofits, they expect that the leaders of nonprofits will demonstrate the impact of their operations, having utilized the funds provided (Despart, 2016). Managers should be fully aware of what the needs of the communities are, so that they would direct the attention of the nonprofit towards improving those communities (Marchesini, 2016). Although many scholars and researchers have stressed the need for financial stability, some researchers such as Moldavanova and Goerdel (2018) have highlighted the importance of social relationships

and connections as a pre-requisite for sustainable operations of nonprofits. Moreover, positive influences from stakeholders make a big difference in promoting efficiency in nonprofits (Miragaia, Ferreira, & Ratten, 2016). Following successful stakeholder engagement and an understanding of what stakeholders require of the nonprofit, managers need to play positive roles in communities in accordance with expectations from various stakeholders (Johansen & Nielsen, 2016). Managers of nonprofits need to; therefore, develop various policies and tools to deal with the needs of various stakeholders (Dobrai & Farkas, 2016).

Feedback from nonprofits to donors is also important to foster sustainability and sustainable operations. Nonprofits need to ensure that they continually give donors information on the work that they are conducting so that they will be aware of how their donations are being spent (Smith & Phillips, 2016). In addition, nonprofits should have good relationships with donors to access future funding and promote sustainability through ‘relationship fundraising’ which entails the process of managers finding out what donors want and ensuring that they employ the relevant steps to fulfill their needs (Baba, 2015; Powers & Yaros, 2013). For most nonprofits, especially those in the Caribbean region, contributions from donors on average represent more than 50% of nonprofits’ budgets which underlines the importance of pleasing donors.

**Public perception.** It is important that managers take great care in assessing and vetting the organizations that their nonprofits collaborate with. Waniak-Michalak and Zarzycka (2015) found that citizens have a reluctance to support any organizations that they view as collaborating with the Government. Therefore, stakeholders in the public

domain would welcome a visible method of funding which will pass their scrutiny and meet their approval. Nevertheless, Waniak-Michalak and Zarzycka further concluded that other large donors seldom use nonprofit financial data to make funding decisions, but instead donate based on the goals of the organization and the work that the nonprofit undertakes. Funding from Governments to nonprofits have increased in recent decades as more government funded services are delivered via contracts with nonprofits (Ali & Gull, 2016).

Many organizations also implement change initiatives in an attempt to demonstrate to stakeholders that they are serious about performance and sound management practices. The measurement of performance in the nonprofit sector is necessary because of immense competition and the insistence of donors on accountability (Lee & Clerkin, 2017). As such, because of greater competition for resources, the request for accountability by funders have increased, so managers need to ensure that their workforce is competent and fosters continual learning (Chang, Huang, & Kuo, 2015). However, nonprofit leaders sometimes do not implement change initiatives in the correct manner and if they do, they do it by using the wrong approach which does not lead to buy-in from the public and; therefore, this could result in non-sustainability. Therefore, to successfully implement change initiatives, leaders of nonprofit organizations need to ensure that they implement quality change initiatives that will be effective in facilitating the process and content of change and promote future sustainability.

Nonprofits can also apply various theories in the realm of change initiatives to adequately implement proposed changes. Valentinov (2015) examined the change



initiatives of organizations by applying Kenneth Boulding's theories of evolutionary economics and organizational change. There is a difference between ecological change and civilizational change within organizations and the theory only considered the ecological change instead of also incorporating the civilizational change, which affects most organizations in their struggle for sustainability (Valentinov, 2015). Whatever the reason for the change, managers will have to adopt the right initiative to suit their organizational structure and needs, so that the transition can be a smooth and seamless one.

Because many nonprofits receive funding from governments, members of the public will hold them accountable for funds received. By understanding the challenges faced by nonprofits with regard to accountability and transparency, the public and donors will grow to have trust in nonprofits, which will boost their credibility (Amagoh, 2015). In addition, managers should strive to have their organizations known to target groups so that the organizations would be favored, that is, the nonprofit brand should be well-known by members of the public (Wymer, Gross, & Helmig, 2016). Sanzo-Perez, Rey-Garcia, and Alvarez-Gonzalez (2017) also stressed that accountability for nonprofit is a critical issue because citizens have placed a lot of emphasis on transparency and objectivity after experiencing various financial crises.

Managers of nonprofits can also explore the possibility of performance management within their organizations because there has been much talk about performance management within the last twenty years. Therefore, the work that social organizations perform should be easily measurable in terms of their impact on

communities (Arena, Azzone, & Bengo, 2015) for any performance management initiatives to be successful. As a prerequisite for performance management to be successful in organizations, leaders need to identify what targets they are trying to achieve so that they would know what approach to adopt (Arena et al., 2015).

**Corporate social responsibility (CSR).** Although corporate social responsibility (CSR) predominantly concerns private sector organizations, it still applies to nonprofits and can help them with regard to the public viewing them in a better light. Lin-Hi, Hörisch, and Blumberg (2015) investigated whether CSR was relevant in the nonprofit sector to boost the trustworthiness of nonprofits and concluded that positive CSR has no significant impact on trustworthiness, while negative CSR has a major impact on trustworthiness. In addition, Kim and Kim (2016) concluded that creating a nonprofit to execute social services is a sustainable model for CSR as it leads to positive public perception for the parent company and is also sustainable because it receives a steady revenue flow from the parent company. Further, Gazolla, Ratti, and Amelio (2017) stated that the adoption of CSR by nonprofits is not a voluntary task, but they are ethically responsible for ensuring that they operate ethically and with transparency.

Nonprofits should also have a good reputation within the communities that they serve to continually receive support. When stakeholders in communities' regard nonprofits as reliable and flexible, it leads to a greater level of donor contributions. Harris and Ruth (2015) stated that by providing quality information to the public, the possibility of receiving more support from the public increases. In recognition of the need to be more transparent and accessible, many nonprofits are now beginning to be more service

oriented by providing donors with better information with regard to how the nonprofit utilizes their contributions to provide services and provide reports on the effectiveness of the interventions within communities (Blum, 2014). As long as managers ensure that they provide adequate information to donors, then there will be a positive effect on contributions (Harris & Ruth, 2015).

**Leadership and management practices.** To ensure renewed or sustained funding, nonprofits must adopt proper management practices for stakeholders to consider them as transparent and accountable. Achieving sustainability is not an easy feat, but it requires extensive commitment and dedication by leaders. Palumbo (2016) stated that servant leadership resonates with the work of nonprofit managers while Tuan (2017) noted that servant leadership fosters knowledge sharing within nonprofits. Further, Bozer, Kuna, and Santora (2015) stressed the importance of leadership to nonprofits, especially the development of new leaders during transition periods. Therefore, nonprofits cannot be successful and remain sustainable unless there is strong and effective leadership (Manley & Mariola, 2016; Norris-Tirrell, Rinella, & Pham, 2018; Qian & Niam, 2016). Organizations with weak management are destined to fail (Sejeli & Mansor, 2015).

Regarding donors, nonprofit managers also need to perform internal assessments to determine why donors might have stopped providing funding so that managers can maybe rekindle the relationship, while also learning how to please possible future donors. Gilstrap, White, and Spradlin (2015) stated that there were five common themes in the way that managers demonstrate internal and external authenticity to stakeholders and concluded that, although internal authenticity was important, external authenticity was

critical to the success of nonprofits. The relationship between nonprofits and donors depends on various factors such as location, culture, and operational risk; therefore, managers should be aware of those factors (Pettijohn & Boris, 2018).

Regarding innovations in leadership and practice, researchers have also explored the possibility of shared leadership, whereby leaders entrust subordinates with the opportunity to make informed decisions related to the operations of the organization. Routhieaux (2015) opined that shared leadership could promote sustainability within nonprofits as well as to improve the resilience and adaptability of the organization when needed. Shared leadership will affect the organization's recruitment and hiring, training, as well as their accountability and performance management. A major shortcoming of many nonprofit organizations is a lack of planning for succession although significant funding has been made available by philanthropists to address succession planning in executive management (Tebbe, Stewart, Hughes, & Adams, 2016). By employing shared leadership, those at a lower level will get a chance to be actively engaged in the running of the nonprofit, which will boost the skills of those staff, thus fostering succession planning.

In addition, with advancements in management and management techniques, there is a range of management tools that managers can use to manage their nonprofits and boost sustainability. Because officers of nonprofits regard their work as projects, project management methodologies can apply to nonprofits and Joslin and Muller (2014) stated that there was a positive relationship between project methodologies and the success of projects with regard to project governance, provided that the methods were

applied correctly by managers. There are also various widely used software packages from major companies such as Microsoft and Sage that are tailored for nonprofits to assist in project management, budgeting, reporting as well as performance evaluation.

Managers have also used risk management tools to assess the overall environment in which projects are based, instead of the project itself. Tevel, Katz, and Brock (2015) also examined three models that assessed the financial vulnerability of nonprofit organizations to determine which one was more efficient in its assessment. The authors concluded that it was important for nonprofit managers to know the financial status of their organization because nonprofits serve many different stakeholders, especially in the communities where they operate, which makes them very important. Tevel et al. further stated that the Tuckman and Chang nonprofit model provided the best indication of financial vulnerability and nonprofit leaders can rely upon the model with great certainty.

Strong leadership is essential to a prosperous organization, whether a for-profit or non-profit organization. Because of the many challenges that befall nonprofits, managers need to be inspirational and motivational (Dong, Bartol, Zhang, & Li, 2016). As such great managers, will challenge their workforce and volunteers to work at a very high level and to challenge themselves to perform to their full potential (Stinglhamber, Marique, Caesens, Hanin, & Zanet, 2015). Lee, Raschke, and St. Louis (2016) also stated that there are various levels of motivation in staff which affect the way that they execute their functions. Further, strong nonprofit managers will have an in-depth understanding of the needs of each of its target groups so that they can direct the efforts of their workforce to satisfying those needs (Junbok, 2015).

Another desirable characteristic of nonprofits leaders is the ability to effectively communicate with employees as well as stakeholders in the communities that they serve. Effective communication helps leaders in confirming that the relevant persons are well aware of the goals and visions of the nonprofits, which can only lead to a high level of performance (Pandey, Kim, & Pandey, 2017). A major downfall of nonprofits, especially in developing country lies in their inability to effectively communicate what benefit they provide to communities as well as sensitizing the public about possible risks and hazards that exist (Cadet & Carroll, 2019).

**Governance.** With regard to management tools, the economic and political environments within countries are in a constant state of change (Casey, 2016). Organizations; therefore, need to adopt change models to be sustainable. Organizations that are strong and able to adapt to changes in conditions, both internal and external will be able to remain sustainable (Witmer & Mellinger, 2016). A board of directors usually govern nonprofits and they comprise of persons with diverse sets of skills and experience, who hail from different backgrounds. Bernstein, Buse, and Slatten (2015) stated that boards which function effectively, helps nonprofits to raise funds and improve relations with stakeholders.

Because board members are of various fields and backgrounds, there could sometimes be differing opinions and point of views, which could cause rifts within the organization. Board members also set the mission of the nonprofit and ensure that they properly account for funds and are accountable to those they serve (LeRoux & Langer, 2016), which underscores the importance of having a well-functioning board. Moreover,

Cheuk, Nichol, Tinggi, and Hla (2018) stated that a major determinant of financial stability in nonprofits is the frequency of which directors are rotated. However, there is usually a divide between board members and executives with regard to the vision for nonprofits which affects performance (LeRoux & Langer, 2016).

The ability of managers to plan for the sustainability of their nonprofit depends on their academic education in the area of sustainability, which includes many areas from communication strategies to management strategies. Natkin and Kolbe (2015) stated that sustainability courses do assist students in their understanding of sustainability concepts and recommended that more universities include sustainability courses in their curricula because students of universities do end up as managers of organizations including nonprofits. Education in sustainability will enable students who become managers, to be aware of the needs of their communities and the world at large and whether they work in the for-profit or nonprofit sector, they will be able to incorporate sustainable development into corporate policies (Rountree & Koernig, 2015). As an alternative, Pippin and Sonja (2016) stated that in addition to providing assurance services, auditing and accounting firms have also been offering opinions on the sustainability of organizations. Managers can; therefore, utilize the service of such firms to determine how well their nonprofit is progressing towards sustainability.

Regarding governance, there is a great consensus that society should be more interested in creating managers that are considerate and caring, instead of those that concentrate solely on operational efficiency. Wymer and Rundle-Thiele (2017) stated that principals of business schools should ensure that they design their curricula in such a way

to produce good members of society instead of only being managerially sound. In addition, Evans and Kinoti (2017) stated that nonprofit management is a unique skill and educators should consider whether such programs should be accredited by various Universities. Further, Murphy (2017) found that persons within and outside of the nonprofit sector have various viewpoints with regard to what relationship leaders of nonprofits should have with communities and the private sector, as well as the challenges that nonprofits face.

**Collaboration.** All nonprofits have a common aim which is to offer services to the members of the community and countries at large. Brown (2017) stated that nonprofits provide services that are complementary. Therefore, nonprofits with similar aims can collaborate to improve efficiency, to be more effective in achieving their social missions (Kim & Kim, 2016). Especially in response to changes in the economic climate, nonprofits can either reduce their workforce and restructure, or they can form alliances with other nonprofits to have a better chance of sustainability (Witmer & Mellinger, 2016). Further, Harris and Ruth (2015) concluded that an ideal way for nonprofits to raise funding is to acquire the endorsement of celebrities, which will promote increased funding but this is not always probable, especially in developing countries.

Fostering partnerships among nonprofits has been touted by scholars as a necessary and critical innovation for the sustainability of nonprofits. Yan, Lin, and Clarke (2018) stated that leaders of nonprofits collaborate to gain access to unique resources and to promote social change and innovation. Brown (2016) also stated that because leaders of nonprofits solve very complex social ills, there is a definite need for collaboration and



partnerships among various sectors. Further Atouba (2016) posited that because nonprofits have been collaborating, the partnership has resulted in more access to resources. Nevertheless, nonprofit heads need to assess what types of organizations they can have fruitful partnerships with, so that their overall objective, which is the provision of social services, can be fulfilled (Shumate, Hsieh, & O'Connor, 2016). By adopting an interactions and networks approach, organizations are able to foster alliances and collaborations which helps to build capacity (Kapucu & Demiroz, 2015).

There is an increasing amount of social collaboration between nonprofits and for-profit organizations. However, based on data from citizens of communities, nonprofits should ensure that they have the necessary and adequate corporate ability before they entertain any collaborations with private entities (Kolk, Van-Dolen, & Vock, 2010). It is also imperative that nonprofits support the right policies to protect their stakeholders and to avoid crowding out (Feiler, Wicker, & Breuer, 2015). Furthermore, nonprofits risk the possibility of crowding out in terms of funding sources whereby Feiler et al. (2015) found that government grants lead to a reduction in donations because nonprofit leaders tend to carry out less fundraising activities once they receive Government grants.

Because many nonprofits are involved in the provision of similar social services, there can be collaboration to improve efficiency and reduce expenditure. Pietroburgo (2016) addressed the issue of sustainability from the point of view of firms collaborating with each other through either a full or limited partnership agreement, but there are many issues that the collaborating agencies need to iron out before they establish partnerships including culture, communication, and powers of members, as well as financial matters.

McDonald, Weerawardena, Madhavaram, and Mort (2013) noted that nonprofits face funding shortages because there is intense competition among similar organizations for donor funding. In addressing the issue of sustainability and realizing that nonprofits provide a social service, McDonald et al. introduced a sustainability-based typology to measure the ability of nonprofits to achieve fiscal as well as social sustainability. The study concluded that the typology of using financial performance and social impact is a sound starting point for studies into the sustainability of nonprofits.

**Innovative techniques and social entrepreneurship.** Innovation is also relevant with regard to the leadership techniques that managers can employ to weather uncertain circumstances. Chio (2016) stated that by adopting innovative management techniques, managers have benefited from increased revenue and awareness of their organization. Because one of the main purpose of nonprofits is to effect social change in the communities where they operate, managers can apply innovative techniques to bring about positive social change within communities (Shier & Handy, 2015).

The work that nonprofits perform goes a long way in boosting the equity of nonprofits. Because social entrepreneurship is known to have a positive impact on economic value and personal development, Parris and McInniss (2014) demonstrated that social entrepreneurship does lead to sustainability but also mentioned that, not all social entrepreneurs plan to solve-problems but are concerned with economic self-interest which ultimately leads to favorable social outcomes. In addition, Andersson and Self (2015) explored whether stakeholders view nonprofits differently by assuming the label of social entrepreneurship and highlighted that there is a common view that nonprofits

can become more efficient, effective, and sustainable by adopting social entrepreneurship in their operations. Further, Berry (2016) stated that nonprofit managers have to incorporate operational as well as social principles in the management of their organizations' resources.

**Marketing.** Spreading the message of the work of nonprofits is also important in ensuring that there is public buy-in and support (Harris & Ruth, 2015). However, unlike private organizations that attract customers through various marketing tools, nonprofits are reluctant to expend significant amounts on marketing as the funds spent on marketing can alternatively be used to fund much-needed social missions in communities (Botner, Mishra, & Mishra, 2015). Further donors like to know that their donations go towards the provision of services, instead of nonprofits using it for administrative costs.

In addition, Powell and Osborne (2015) stressed the role that marketing plays in promoting the sustainability of social enterprises by examining the social as well as the economic objectives of social enterprises. Therefore, based on the goals of the nonprofit, managers will need to tailor their marketing strategy to target the intended audiences and donors. The targeting of donors was further elaborated by Strotmann et al. (2017) in stating that nonprofits could attract donors by well-targeted advertisement campaigns. However, although marketing has its benefits to social enterprises, many misunderstand its application because they see marketing as a business tool instead of a tool that nonprofits can effectively use (Powell & Osborne, 2015). This underscores the need for nonprofit managers to be knowledgeable of the various tools at their disposal, whether

widely associated with nonprofits or not, to boost their organizations' chances of sustainability.

Due to an environment of limited resources and organizational competencies in many nonprofits, managers need to be strategic when designing marketing plans (Rudov, McCormick-Rickett, Kingsmill, Ledford, & Carton, 2015). The decision of one nonprofit manager has an effect on other organizations in the nonprofit arena (Kim & Kim, 2016) and it is important that managers understand how all of the various sectors of the economy interact and affect each other to enable a successful organization. The income structure of nonprofits also plays a major role in possible marketing strategies of nonprofits. Those nonprofit organizations whose income stem from membership fees and other fee-based income are more likely to implement marketing activities compared to those that receive the majority of their funding through donations (Cacija, 2013). nonprofits that incorporate income via fee for service usually have more freedom in the use of funds that funds received from Donors, which they donate for specific activities.

**Succession planning.** It is important that, in addition to fostering sustainability with regard to financial and operational sustainability, that nonprofit managers also plan for succession so that the organization will continue operations after they leave (Santora, Sarros, Bozer, Esposito, & Bassi, 2015). However, as all organization are different in terms of their structure and management policies, nonprofit leaders must tailor their succession plan to ensure that it is consistent with the overall direction that the organization wants to proceed in (Chebikova, Misankova, & Kramorova, 2015).

Moreover, adequate succession planning and the transfer of information is critical to the sustainability and effective operations of nonprofits (Santora & Bozer, 2015).

Many times, nonprofit managers or other senior leaders are the main instruments in the operations of the organization and lack of succession planning exposes the organization to the risk of a confusing transition (Santora et al., 2015). Loss of key members of nonprofits also leads to diminished performance and loss of confidence from stakeholders (Joe, Yoong, & Patel, 2013). Nonprofits must therefore identify persons with the ideal expertise, set the stage for a successful takeover, and communicate the change effectively to all parties involved (Dyck, Mauws, Starke, & Mischke, 2012).

An important aspect of nonprofit sustainability is the ability of the nonprofit to attract and maintain a qualified workforce. Bright (2016) considered the impact of Public Service Motivation and found that there are many factors that lead employees to pursue a career with nonprofits. One important factor affecting the choice of individuals lies in the fact that they want to serve the public and are not always in pursuit of financial gains (Nelson, 2017).

**Ethical practices.** Regardless of the source of funding, nonprofits exist to serve the communities in which they operate and the public and other stakeholders must always see them as operating ethically. Managers need to; therefore, always maintain the interests of their beneficiaries, who are the main stakeholders of nonprofits (Wellens & Jegers, 2016). Beneficiaries will view the nonprofit as effective in their operations and the beneficiaries' association with the nonprofit will not cause them any harm. Transformational leadership styles which embody ethical and authentic leadership foster

sustainability and motivates subordinates to do what their manager requires of them (Zigarmi & Roberta, 2017). Ethical behavior also resonates with donors because they tend to contribute to nonprofits in which they have a level of trust (Barber & Levis, 2013). In many nonprofit organizations, senior managers and other leaders are the ones who facilitate and promote the adoption of ethical standards and ensure that employees follow their lead with regard to being trustworthy with funders (Shehu et al., 2016). The need for ethical practices is critical because stakeholders would not want to associate themselves with nonprofits that have a terrible reputation.

On the other hand, nonprofit managers also need to ensure that they select donors whose missions align with those of the nonprofit. Shea and Wang (2016) stated that there are some factors that influence managers' decision to approach donors for funding including mission alignment and the ability of the donor to attract additional resources for the nonprofit. In addition, Shea and Wang found that nonprofits with higher levels of operating expenditure usually have a higher degree of revenue diversification, which calls for greater caution in nonprofit managers' selection of donors that the organization associates themselves with.

**Strategic targeting.** It is imperative that nonprofits understand the characteristics and needs of donors who provide funding for the activities that they would like to execute. Managers; therefore, need to undertake activities to target prospective donors (Powers & Yaros, 2013), mainly because donors make contributions to nonprofits that mean something to them and which give them a sense of satisfaction. In addition, managers of nonprofits have to clearly articulate to prospective donors, the benefits of

their support and detailed descriptions of the activities to which their funds will contribute (Cacija, 2013).

In terms of strategic targeting, managers of nonprofits also need to ensure that they provide services where it is needed the most. Lam and McDougle (2016) stated that there is usually a low number of nonprofits in low-income communities, although residents of those communities need the services the most. Even in cases where there are nonprofits present in low-income communities, residents do not have the requisite access to the services (Lam & McDougle, 2016).

**Decision making tools.** Experts in the nonprofit arena, have often stated that the managers of nonprofits do not consider all of relevant economic and social issues when making decisions on the operations of their organization (Rinaldi et al., 2015). There are a number of management tools such as the decision support system (DSS) or the Sustainable Infrastructure Rating System for Developing Countries (SIRSDEC) to promote the success of projects (Diaz-Sarachaga et al., 2017). If managers do not have expertise in the use of the various applications, they can employ persons with the requisite knowledge to take advantage of the decision-making tools. Managers of nonprofits have a responsibility to constantly review economic conditions and other circumstances that affect their sources of funding and; therefore, need to develop the right tools to evaluate and assess the various sources (Kearns et al., 2014). Furthermore, Lam and McDougle (2016) stated that analysts could measure the effectiveness of nonprofits by looking at their equity ratio (ER) and return on assets (ROA) which would give

nonprofit managers an indication of whether their programs and policies are successful and effective.

**Operating efficiency.** For nonprofits to be sustainable, managers must instill and promote efficiency in their operations, by executing their mission effectively and doing so cost-effectively. The source of funding affects efficiency in nonprofit operations, whereby nonprofits that receive fees through the provision of services, are usually more efficient in managing funds than nonprofits that rely only on donations (Ecer, Magro, & Sarpca, 2017). Also, in making decisions about providing funding, donors consider how effectively nonprofit managers execute their activities (Ecer et al., 2017).

Some government entities also use performance management techniques to evaluate the work of nonprofits and make decisions on future support. Nonprofit managers have to take the necessary steps to confirm that all officers of the organization are on board with regard to operating efficiency to boost sustainability. As such, Pandey et al. (2017) stated that when members of nonprofits are fully aware and appreciate the mission of the nonprofit, then they will perform their function more efficiently and with more passion. Van Siclen (2017) stated that an effective strategy by managers is to ensure that they promote alignment throughout the organization to achieve the objectives of the organization. Some nonprofit leaders facilitate regular training to their staff and constantly instill the organization's values and mission, to promote commitment and efficiency, which further promotes sustainability. Further, Devine (2016) stated that training, if well designed and executed, will result in better management of resources by managers, thus promoting sustainability and productivity.



There are cases where Government entities collaborate with nonprofits and they require nonprofits to incur expenditure then seek reimbursement based on agreed deliverables. Government entities use performance-based evaluation techniques to ensure that nonprofits have executed the work as agreed before granting reimbursements (Jolles et al., 2017). Therefore, if nonprofits do not operate efficiently, their inefficiency will affect their ability to receive funds, which would ultimately affect their ability to survive and to remain sustainable.

### **Transition**

The purpose of this qualitative study is to explore the strategies that managers use to sustain funding in the nonprofit sector. Section 1 outlines the basis of the study and contains the background of the problem, the problem statement, and the purpose of the study. Section 1 also includes the nature of the study, conceptual framework, significance of the study, and the research methodology as well as the main research question that encompass the study and the interview questions that I used during interviews with nonprofit managers.

A significant element of Section 1 is a review of the professional and academic literature comprising a summary of studies that addressed the issue of nonprofit sustainability, grouped into areas of concertation. The literature review contains details of current literature on the purpose of nonprofits, the services they provide, their responsibilities, sustainability issues that nonprofits face, and some of the causes of those sustainability issues. I then reviewed the literature with regard to financial and nonfinancial measures that managers have taken to foster sustainability. Financial

measures included financial diversity, the use of financial tools, and capitalization, while nonfinancial means included partnerships with the private-sector, fostering improved relationships with stakeholders, and enhancing public perception.

Section 2 includes a complete analysis of the research purpose, the role of the researcher, participants, research methodology and design, population and sampling, and ethical considerations of the research, with particular reference to the steps taken to protect research participants and the data they have shared. Section 2 also includes the data collection instruments and techniques, data organization techniques and a description of the data analysis process. Finally, I include information about the data reliability and validity criteria used in my research.

Section 3 will contain the research findings in relation to the themes as well as their application to the conceptual framework. Because a major part of the work of Walden University is the promotion of positive social change, Section 3 also highlights the application of the findings to professional practice, the implications for the study to positive social change and recommendations for action and future research. Finally, Section 3 includes a personal reflection of my experience in the DBA doctoral journey, including any biases, preconceived ideas, and how those biases and preconceived ideas changed upon completion of the study. Finally, the study concludes with a statement that I hoped would give a clear take-home message to the readers.

## Section 2: The Project

Section 2 of this study includes the main prerequisites for the successful completion of the study, particularly the means of data collection and analysis. This section includes the purpose statement, the role of the researcher, as well as information on participants. Section 2 also includes the research method and design, population and sampling, ethical research, data collection instruments and technique, data organizing technique, data analysis, reliability and validity of data, transition, and summary.

### **Purpose Statement**

The purpose of this qualitative multiple case study was to explore strategies that nonprofit managers use to sustain funding in the nonprofit sector. The target population consists of three managers of successful nonprofit organizations in the United States and the Caribbean, whose strategies have resulted in sustainable funding. The implications for positive social change includes the potential for struggling nonprofit organizations to become sustainable. This may improve the availability of crucial social services to communities within the United States and the Caribbean. In addition, the survival of nonprofits may lead to more employment for youth in the community, an overall improvement in living standards, and encourage economic growth.

### **Role of the Researcher**

Yin (2018) stated that the role of the researcher in qualitative studies is to obtain data from participants and observe the behavior of individuals of groups. As such, my role in this qualitative multiple case study was to collect and analyze data from participants and to report the findings of my analysis while protecting the identity and

integrity of the data that participants. The topic of nonprofit sustainability has always been of keen interest to me because I have worked in the nonprofit arena for over 10 years and have seen the challenges that nonprofit organizations face in striving for sustainability. For this reason, for the data collection phase, there was a preference for nonprofits that have been in operation for more than 10 years. Although I have worked in the field for 10 years, I had no prior knowledge of the participants before the research.

Prior to conducting the interviews and collecting data, I read and fully understood the Belmont Report, which was created by the National Commission for the Protection of Human Subjects of Biomedical and Behavioral Research (1979), to adhere to Walden's established ethical standards. The Belmont Report summarizes the ethical principles and guidelines that researchers must follow once the researcher includes human subjects (Adashi, Walters, & Meinkoff, 2018). The three fundamental principles are respect for persons, beneficence, and justice. The Belmont Report also requires researchers to secure personal information and safeguard participants from harm during the research process (Bromley, Mikesell, Jones, & Khodyakov, 2015).

Respect for persons involves the principle that researchers should treat persons as independent agents and protect those with diminished autonomy (Adashi, Walters, & Menikoff, 2018). Nepper and Chai (2016) also stated that participants must willingly partake in the research and sign the relevant consent forms. In that regard, I treated all participants equally regardless of their personal circumstances and had them sign consent forms. Beneficence requires researchers to protect the well-being of participants by respecting their decisions and minimizing their exposure to harm (Adashi et al., 2018). I

ensured that I adequately designed my research so that participants would be empowered to make a decision to participate and I treated participants' information with the utmost confidentiality. The principle of justice relates to who would receive the advantages from the research and who suffer the disadvantages (Adashi et al., 2018). To adhere to the principle of justice, I verified that my procedures for selecting participants were fair and free from any personal biases.

In concurrence with the Belmont Report, researchers should also adhere to the established ethical standards to alleviate any biases that they bring to the research (Ginwright & Cammarota, 2015; Thomas, 2015; Yin, 2018). Further, Devotta et al. (2016) stated that bias occurs in some cases because the researcher and participant may have familiarity of the research topic. Moreover, McDermid, Peters, Jackson, and Daly (2014) stated that, to agree to ethical responsibility as a researcher, there should be no previous relationships with the participants or the organization where they work, until Institutional Review Board's (IRB) approval. I ensured that I alleviated any biases and I ensured no prior contact with participants until IRB approval.

Yin (2014) stated that researchers should ask open ended questions so that participants can give their perspective and it also results in the removal of any researcher bias. I asked open-ended questions and did not try to influence participants' responses. To further avoid any biases and misinterpretations, there was a follow-up process with the participants to ensure that the information I recorded was accurate and free of misstatements.

The establishment of interview protocols is of great importance in research to properly organize the process before and during interviews and to reduce the possibility of biases (Yin, 2018). An appropriate interview protocol also enables researchers to collect data that is of excellent quality and that is reliable (Castillo-Montoya, 2016). Further, Merriam and Tisdell (2015) posited that researchers use interview protocols to ensure the reliability and validity of their studies. Because participants will be senior managers of nonprofits and have busy schedules, I scheduled interviews for no more than one hour, while I reviewed documentation offsite, once the participant permitted. I also followed the interview protocol to ensure a consistent line of questioning for each participant.

### **Participants**

While Morse (2015) stated that researchers should interview experts in the area in which they are studying, Yin (2018) stated that researchers will ensure accurate and detailed research by obtaining data from multiple sources. Moreover, Newington and Metcalfe (2014) stated that it is critical that researchers recruit suitable participants for their studies, but many researchers still falter in recruiting the ideal number of participants. To obtain a suitable mix of participants, I needed to obtain views from successful managers, not just in the United States, but also from countries in the Caribbean. Furthermore, to address my research questions, I selected senior managers that fulfilled the following criteria: (a) were in the post for more than 5 years and had implemented or inherited successful strategies to sustain their organization, (b) were above the age of 21, and (c) the holder of at least a bachelor's degree. In addition,

nonprofits fitted the criteria of having been in operation for more than 10 years prior to the research, as this was an indication of sustainability. In addition, I preferred managers who were in the post for at least 5 years because during that time, they would have acquired the inherent knowledge of best practices for sustainability within the successful organization.

Yin (2018) stated that three to five persons are a suitable sample size for studies. Furthermore, research will be valid and reliable if researchers are able to have adequate access to participants, coupled with a sound plan of action (Depoy & Gitlin, 2015). I aimed to access participants from various sources by using LinkedIn as well as through professional networks that I had established while working in various Caribbean countries. The participants received an invitation to join my network via LinkedIn and I shared information about my research with professional acquaintances to share in their networks so that I could have a wider reach to entice participants to the research.

Because participants were located in different countries, I used virtual and electronic means of communicating with those that I selected to form and maintain a strong working relationship. According to Merriam and Tisdell (2015), fostering sound relationships is essential in gaining access to participants. Furthermore, Houghton, Casey, Shaw, and Murphy (2013) stated that the ideal way to promote a working relationship with participants is to operate within ethical guidelines. In the initial stages, I contacted the participants via email to introduce my study, I utilized virtual means of communication, especially Skype, to answer questions and clarify any issues that they had. Because I was not previously acquainted with the participants, building trust and

familiarity was very important, so I ensured that there was regular interaction to establish rapport, which forged a sense of cooperation and candidness during interviews.

To align participants with the overarching research question, I ensured that I selected participants who had knowledge of successful nonprofit sustainability strategies. Moreover, Lewis (2015) stated that researchers need to carefully choose participants to derive the information that is relevant to the study. Because the overarching research question hinged on sustainability strategies implemented by nonprofit managers, my selection of managers of nonprofits that were in existence for more than 10 years was relevant. Further, in order to be familiar with the proven sustainability strategy, my choice of managers that were in the post for at least 5 years also aligned to the overarching research question.

### **Research Method and Design**

In this section, I detail my selection of a qualitative method and multiple case study research design. Leedy and Ormrod (2016) stated that the research method and design should interact with each other to enable the researcher to form a conclusion through investigation. I also justify my choice of design over other key designs and indicate how my design will ensure data saturation.

#### **Research Method**

Scholars need to ensure that the research method they choose is the most appropriate for the achievement of their goal. Yin (2018) stated that there are three research methods, which are quantitative, qualitative, and mixed methods. In addition, researchers use qualitative designs to investigate behaviors through characteristics,



choices, and actions, which they obtain via interviews (Marshall & Rossman, 2016). Further, Campbell (2014) and Brinkman and Kvale (2015) agreed that qualitative studies are fitted for the analysis of phenomenon, while Makrakis and Kostoulas-Makrakis (2016) stated that qualitative researchers base their studies on reality and the quest for meaning. Because my overarching research question aimed to obtain answers on successful sustainability strategies, a qualitative research method was the most suitable for the proposed study. In addition, as I was seeking to investigate a situation that occurred or will occur, a method that I could use to assess a phenomenon was more appropriate.

Because sustainability strategies may be similar yet different among various nonprofits, a qualitative study was appropriate because it allows the researcher to assess beliefs, values, and other social determinants that interviewees believe (Antwi & Hamza, 2015). Quantitative research methods allow the researcher to examine analytical data and are ideal to discover strategies (Barnham, 2015). In addition, quantitative methods are more suitable when the researcher is trying to determine a relationship between different parameters through the analysis of data (Hoare & Hoe, 2013). Further, researchers use the quantitative method to present research questions as hypothesis and use numerical data to compare results and variables, which was not suitable for determining management and financial strategies.

Mixed methods combine qualitative and quantitative methodologies into one study (Carins, Rundle-Thiele, & Fidock, 2016; Vink, Van Tartwijk, Bolk, & Verloop, 2015). Further, in mixed-methods studies, researchers use deductive research

(quantitative) to test hypothesis and inductive research (qualitative) to obtain data from interviews and observations (Sparkes, 2014). As such, I did not use the mixed methods approach because of the quantitative element.

### **Research Design**

The choice of research design is of the utmost importance in conducting a successful study. According to Colorafi and Evans (2016), researchers use a research design to bring together the various components of a study to enable them to adequately address the selected business problem. I considered using: (a) case study, (b) phenomenology, and (c) grounded theory, but decided to use the case study approach. Because case study designs allow researchers to answer what, how, and why questions (Shekar, 2014; Yin, 2018), it was more applicable in answering the research question regarding sustainability strategies than the other approaches, especially because I asked what and how questions.

Yin (2018) stated that employing a case study design also enables researchers to gain an in-depth understanding of circumstances through interviews and the analysis of other sources of information. Yin further stated that researchers use a case study design by repeating interviews to analyze a phenomenon under investigation. Successful sustainability strategies vary among organizations; therefore, I needed to employ a multiple case study to adequately investigate the various successful strategies.

Researchers use the phenomenological research design to investigate and understand participants' lived experiences (Adams & Van Manen, 2017). Because the aim of the research was to investigate proven sustainability strategies and not the lived

experiences of various nonprofit managers, I did not use the phenomenological research design. I also considered using grounded theory for this research. Johnson (2015) stated that grounded theory enables the researcher to discover theories from data they have collected. However, because the aim of the research was to identify successful strategies and not to establish theories, a case study design was more appropriate.

With a multiple case study design and in the nonprofit sector where there are many similarities between organizations and their procedures, there would be cases where participants would repeat the same responses through interviews. The sample size that researchers select for their study determines data saturation in qualitative studies (Boddy, 2016). Further, Tran, Porcher, Tran, and Ravaud (2017) stated that researchers reach the point of data saturation when the same data and themes keeps reoccurring from interviewees. Moreover, Yin (2014) stated that researchers must continue interviews with participants and ask follow up questions until no new data emerges. I conducted interviews with the managers of at least three nonprofits and asked the relevant follow-up questions until no new data or themes emerged from the responses. Researchers use member checking to confirm credibility by allowing participants to correct any errors or misconceptions (Reilly, 2013). To confirm member checking, I sent responses to each interviewee to confirm that my interpretation of their answers was correct, which further confirmed data saturation.

### **Population and Sampling**

Researchers need to select a sampling method that they can apply to the objective of the study and the characteristics of the participants. O'Brien et al. (2014) stated that

purposive sampling results in viable participants with the relevant characteristics that researchers are seeking. Further, Abrahams (2017) stated that researchers use purposeful sampling to investigate a specific issue by choosing participants that have the knowledge and experience in dealing with the issue. In addition, Gentles, Charles, Ploeg and McKibbin (2015) stated that the most common sampling method in qualitative studies is purposeful sampling. As I was assessing successful sustainability strategies, I chose the purposeful sampling method because I believed that managers of successful nonprofits were ideal as participants. Although I had many options, I interviewed managers who were in the post for at least 5 years and had implemented or inherited successful strategies to sustain their organizations.

I selected managers from at least three nonprofits from the Caribbean and from the United States of America. In qualitative research, the main aim is to concentrate on a few participants who can clearly express their experiences to enable the researcher to answer the research question (Baskarada, 2014). Further, Elo et al. (2014) stated that because all qualitative studies are different regarding purpose, there is no correct sample size, while Suresh and Chandashekara (2014) stated that researchers should be careful to select a number of participants, which would limit the possibility of bias within the research. Moreover, Andersson and Evers (2015) recommended that researchers use a sample size of no less than three. As there are many different types of nonprofits worldwide that provide a wide range of services, I thought that three was a suitable number of organizations from which to obtain a diverse range of information and answers. Further, because nonprofits are diverse, I believed that selecting nonprofits from

the United States and the Caribbean was a good representation of strategies, which struggling nonprofits can apply to their operations.

Data saturation is critical to ensure that research is credible and trustworthy; therefore, researchers need to determine a sample size to ensure data saturation. O'Brien et al. (2014) stated that researchers use data saturation as a tool to set the parameters of their research to certify completeness and relevance, while Yin (2014) stated that researchers should select a sample size that will enable them to obtain redundant answers. In addition, Elsayah et al. (2015) stated that researchers should conclude the data collection phase of their research when they believe that they are receiving no new information from participants. Further, Constantinou, Georgiou, and Perdikogianni (2017) stated that researchers meet the point of data saturation when they receive valid results and when interviews present no new data. With the scholarly information in mind, I asked my interview questions and probing follow-up questions where necessary, until I was unable to derive new information from participants. Researchers can also use member checking whereby participants can correct researchers' interpretations of participants' answers and add information where necessary (Fusch & Ness, 2015). As such, I used member checking by giving participants my interpretation of their answers to interview questions and asked participants to verify the accuracy of my interpretation of their answers.

The criteria that I used for selecting participants was be senior managers that: (a) were in the post for more than five years with experience in the successful implementation of sustainability strategies, (b) were above the age of 21, and (c) were the

holder of at least a Bachelor's degree. Palinkas et al. (2015) stated that researchers should base their criteria to select participants on the participants' role in an organization.

Further, Still and Wilkinson (2014) stated that by using a particular criterion to select participants, researchers would derive complete information, obtain a detailed understanding, and obtain participants who are motivated to partake in the research study.

I believed that the criteria I applied to select participants allowed me to derive suitable answers to my research questions because of their knowledge of nonprofits' successful sustainable strategies as well as their experience and qualification in the field.

Interview locations should be agreed upon by both researcher and participant.

Ecker (2017) stated that researchers should prioritize the participants' needs when agreeing on the interview location. Moreover, Dikko (2016) stated that the researcher and participant should agree on an interview location that is free from noise and distractions, especially when recording the interviews. I prioritized the need of the participant when agreeing upon a location for the interviews, which allowed for open and comprehensive dialogue.

### **Ethical Research**

It is crucial, especially for Walden studies, that doctoral students conform to the highest ethical standards when conducting their studies. Loue (2014) stated that researchers have the ethical responsibility to ensure that they do no harm during the entire research process. Further, Hammer (2016) stated that participants should fully understand the purpose of the study and willingly partake. Researchers widely use informed consent (Whitley & Kite, 2013), which clearly articulates the purpose of the study, the rights and

expectations of participants, any possible risks involved in their participation, data storage procedures, and withdrawal procedures. In addition, Bahramnezhad, Cheraghi, Fomani, Sanjari, and Shoghi (2014) stated that the main tenet of informed consent is that researchers must clearly articulate all aspects of the research to participants. As such, I used informed consent, the most popular form of ensuring that participants understand the ethical boundaries of the study and their ethical rights. I explained the informed consent form to the participants and secured signed informed consent forms from participants.

Participation in research should not feel like an obligation; rather, researchers should make it easy for participants to leave the study at any given time. Howell et al. (2015) stated that the incorporation of withdrawal procedures by researchers ensures ethical conduct towards participants. As such, I made it clear to participants that they were free to withdraw from the study at any time, which was an ethical right given to them and I verified that participants understood that they were free to withdraw from the study at any time by simply sending me an email or a message via social media. I also highlighted the fact that there would be no penalties for withdrawal from the proposed study.

The provision of incentives for participants could either be an advantage or a disadvantage. Holland (2017) stated that researchers should confirm that there are no incentives for participation, thus ensuring that participation in the research is free from any obligations, which ensures objectivity and honesty in responses. Conversely, Smaglik (2016) stated that when participants receive an incentive, they are motivated to provide

quality information. However, I clearly articulated to participants that there would be no incentives for their participation as evidenced on the consent form. The only reward that I provided was in the form of a thank you card expressing my gratitude for their participation in the proposed research study.

It is important that researchers and participants have a professional and respectful relationship, characterized by ethical behavior to build trust and cooperation (Yallop & Mowatt, 2016). Tam et al. (2015) also stated that researchers should adhere to research guidelines so that they follow ethical and integrity standards in research. The Belmont Report (1979) outlines measures that researchers can follow to ensure the ethical protection of participants (Adashi, Walters, & Meinkoff, 2018). As such, as per the Belmont Report, I adhered to the principles of respect for persons, beneficence, and justice to adequately ensure the ethical protection of participants.

Tsan and Tsan (2015) stated that researchers should protect the rights and welfare of participants at all times during the research process. Further, Hammersley (2015) stated that by having participant sign a consent form, it satisfies their ethical protection because the consent form identifies the nature of the study, the risk and benefits, as well as the procedures of the study. Therefore, I ensured that participants read, understood, and signed the consent form before interviews, which I believed would adequately assure their ethical protection.

It is also a requirement of Walden University to obtain the approval of the IRB, so I obtained the approval before approaching participants to further ensure the ethical protection of participants. Friese et al. (2017) elaborated the importance of IRB approval



by stating that any research involving human subjects, should have IRB approval.

Additionally, the involvement of the IRB is not only a requirement of Walden, but IRB approval also adheres to U.S federal regulations and international best practices, to certify that the benefits of the study will outweigh any possible risks. To further comply with Walden's ethical standards, I completed the National Institutes of Health (NIH) Web-based training course, titled *Protecting Human Research Participants* (see Appendix A).

Yin (2014) stated that it is common research practice to ensure that researchers adhere to confidentiality during the research process. To protect the confidentiality of participants, I will securely store the data for 5 years in an encrypted storage medium, which I will destroy after the conclusion of the 5 years. Further, I password-protected all of my files that contained participant information and I stored the data on flash drives, kept in a safe location. I also reassured participants that I will use the information that they provided for research purposes only.

It is also important that researchers take the necessary measures to protect the identity of participants. Yin (2014), Bartle et al. (2015), and Sawicki (2017) stated that it is the duty of researchers to protect the identity of participants; therefore, I did not use names for participants and organizations, but unique codes (P1, P2, & P3) for each throughout the research process. In addition, I recorded responses in such a way that there would be no linkages between the responses from participants and the participants themselves.

### **Data Collection Instruments**

According to Mohammed, Peter, Gastaldo, and Howell (2015), researchers need to realize that, as the primary data collection instrument, the process includes replicating data collection until no further themes or codes emerge from the data. Moreover, Marshall and Rossman (2016) stated that the researcher is the main data collection instrument in qualitative research. As the researcher, I was the primary data collection instrument and I performed my role by obtaining, recording, analyzing, and verifying data collected from participants.

There are a number of additional data collection instruments that researchers have at their disposal to assist in the data collection process including informal or semistructured interviews, phenomenological in-depth interviews, review of organizational documentation, and focus groups (Palinkas, et al., 2015). However, a semistructured, format allows for flexibility and openness between interview and interviewee and allows the researcher to delve into thoughts and behaviors (Peterson, Hahn, Lee, Madison, & Atri, 2016). Further, semistructured interviews are the most widely used data collection instrument in qualitative studies (Brinkman, 2016). As such, I chose semistructured interviews for this research study. Review of organizational documentation, such as reports and other administrative documents also assists researchers in comprehending organizational culture and context (Poulis, Poulis, & Plakoyiannaki, 2013). As the main data collection instrument, in addition to semistructured face-to-face and online interviews, I also reviewed the financial data of

the nonprofits, with specific reference to their financial statements, annual reports, and media coverage.

Researchers use interview protocols in semistructured interviews as an instrument of inquiry to confirm that they pursue similar lines of approach and questioning with each interviewee (Peters & Halcomb, 2015). Neuert and Lenzner (2016) stated that interview protocols comprise of pre-scripted probing questions to derive the required information from participants. Harootian and O'Reilly (2015) further stated that interview protocols comprise of building camaraderie with participants and explaining the purpose of the study in addition to targeted questions and follow up. Marshall, Cardon, Poddar, and Fontenot (2013) also recommended the use of interview protocols whereby the researcher would ask participants the same questions. For my primary data collection instrument, I used an interview protocol (see Appendix B), which included a list of the open-ended interview questions that I asked during face-to-face and online, semistructured interviews to confirm a consistent line of questioning.

Yin (2013) stated that researchers should use multiple sources of data, such as company documentation to collaborate data from other sources. Furthermore, Merriam and Tisdell (2015) stated that documentation includes financial records and other company documents that the researcher can use to derive further understanding of the topic under research. For my secondary data collection instrument, I reviewed company documentation, such as financial statements, annual reports, and workplans.

It is imperative that researchers ensure that they put the necessary steps in place to enhance the reliability and validity of the data collection process. Researchers use

recordings, which allow researchers to correctly transcribe the responses of participants (Crozier & Cassell, 2016; Elger, Handtke, & Wangmo, 2015). In addition, Birt, Scott, and Cavers (2016), as well as Hadi and Closs (2016) stated that member checking is instrumental in the interview process to promote reliability and validity and entails the process of verification by the participant that the data the researcher interpreted are consistent with the responses that they provided. Therefore, I interpreted the responses that I derived from the interviews and presented this interpretation to participants for their review and confirmation. In addition to member checking, to confirm reliability and validity, I asked the same questions in each interview and endeavored to maintain similar durations for all interview sessions.

Researchers should also use multiple sources to derive information in order to enhance the reliability and validity of data. Gibson (2016) stated that researchers often use methodological triangulation, which is the use of multiple sources of data. Fusch and Ness (2015) also argued that methodological triangulation is the use of varying sources of data to have a complete understanding of phenomena under investigation. As such, I used methodological triangulation by obtaining data from interviews as well as from document reviews to promote the reliability and validity of both instruments.

### **Data Collection Technique**

The main purpose of this research study is to explore strategies that nonprofit managers use to sustain funding in the nonprofit sector. Elger et al. (2015) stated that researchers widely use semistructured interviews along with a review of documentation to collect data in case studies. Moreover, Elsayah, Guillaume, Filatova, Rook, and

Jakeman (2015) stated that semistructured interviews help in building a relationship with interviewees, which results in better cooperation and openness. Further, Silverman (2016) stated that interviews are the most common means that researchers use to collect data in qualitative studies. As such, I obtained data via semistructured, face-to-face and online interviews with nonprofit managers whose successful strategies resulted in their organizations attaining sustainability and were in the post for at least 5 years. Tight (2017) also stated that additional data assist researchers in gaining a better understanding of the research topic. In addition to interviews, I reviewed company documents including financial statements, strategic plans, annual reports, and reviews of the websites of the organizations.

Further, Alexander, Bryce, and Murdy (2016) stated that researchers can design interview protocols so as to derive the required information from a number of participants. Therefore, my open-ended interview questions followed an interview protocol to derive nonprofit sustainable strategies (see Appendix B). Because data collection is a critical aspect of the study, researchers should ensure that they efficiently capture data. De Felice and Janesick (2015) stated that the use of technology, such as recording and transcribing devices are very beneficial in research. Therefore, in conducting face-to-face and online interviews, I used a recorder to adequately capture all data from participants.

Face-to-face semistructured interviews present researchers with a host of advantages such as: (a) the ability to immediately ask follow up questions, (b) the participant feels more comfortable, and (c) the researcher has the opportunity to build

rapporport with the participant (Marshall & Rossman, 2016). However, there are also disadvantages such as: (a) some participants may be uncomfortable with face to face interaction, and (b) limited previous contact may result in a lack of openness and camaraderie from participants (Marshall & Rossman, 2016). Fusch and Ness (2015) also posited that semistructured interviews permit open dialogue between researcher and participants, Rowlands, Waddell, and Mckenna (2015) highlighted a major disadvantage of semistructured interviews in that they allow participants' personal biases to dictate their responses. However, after IRB approval and before interviews, I made frequent contact with participants to build a certain level of trust and familiarity so that I could have conducted the interviews with a sense of openness and cooperation.

Because interviews only comprise one form of data collection technique, there is the added advantage of the researcher obtaining data via a review of company documentation and other sources of information. Elger et al. (2015) posited that by reviewing company records, the researcher can validate the information that participants provide during interviews. However, because individuals prepare company records, there is the possibility that company officials can manipulate such records, which results in the researcher gathering inaccurate information (Rowlands et al., 2015).

A pilot study is a small-scale preliminary study executed by researchers to evaluate the feasibility of undertaking a more extensive study on a particular topic. Doody and Doody (2015) stated that a pilot study was appropriate whereby researchers want to test the process of data collection and analysis to ensure that a larger study would be feasible. However, after IRB approval, a pilot study was not necessary because the

main research is a limited case study that includes interviews from only three nonprofit managers. If the research study were intended to include a larger number of managers, then a pilot study would have been ideal.

It is important that researchers confirm that the information they have gathered from participants during the interviews is consistent with what the participant intended to convey. A very common tool that researchers use is member checking whereby researchers present their interpretations of participants' answers to interview questions to the participants and ask them to verify the accuracy of the researcher's interpretations (Crozier & Cassell, 2016). In addition, Rajesh and Ramesh (2016) stated that researchers should transcribe the recordings after each interview to capture all possible data.

### **Data Organization Technique**

Given the importance of data to the outcome of any research study, the process of organizing data will be critical in permitting a researcher to have easy and adequate access to the data that they collect. Researchers use labelling systems, codes, and logs to organize data by types, names, and dates that they collected during their research (Marshall & Rossman, 2016). Further, because researchers collect large amounts of data, they need a technique to organize data to allow for easy access to information (Merriam & Tisdell, 2016). Watkins (2017) also stated that the use of software such as Microsoft Word™ and Microsoft Excel™ are excellent means of organizing data. As such, I assigned a code to each participant such as P1, P2, and P3 and filed encrypted data relating to each participant, such as recordings, company data, and other electronic data in folders with the assigned codes. I also stored the interview transcripts in Microsoft

Word format in the various coded folders and further label the files with unique identifiers. I password-protected all of the folders and save them on a thumb drive, which I kept in my safe along with hard copies of all documents relevant to the participants and the interviews to be conducted. I will store all data for 5 years and delete and shred them after that period has elapsed.

### **Data Analysis**

Raw data that researchers derive from interviews and other sources would be meaningless unless researchers can analyze the data to draw a conclusion to ensure completeness and reliability (Bree & Gallagher, 2016). There are various stages in the data analysis process including: (a) compiling data, (b) disassembling data, (c) reassembling data, (d) interpreting data, and (e) drawing a conclusion (Yin, 2018). As such, there are various data analysis processes for various research designs. Carter, Bryant-Lukosius, Di Censo, Blythe, and Neville (2014) stated that four types of triangulation exist in research, which are: (a) data triangulation, (b) methodological triangulation, (c) theoretical triangulation, and (d) investigator triangulation. Further, Fusch and Ness (2015) stated that researchers use methodological triangulation to verify completeness in the data collection process while Morse (2015) stated that methodological triangulation entails the comparison of data from various sources to confirm credibility. Because I obtained data from various sources, I used methodological triangulation to compare and validate data from member-checked interviews transcripts against data I derived from company documentation.



Unlike quantitative studies, data that researchers obtain from qualitative studies via interviews and documentation reviews are not in a standardized format (Watkins, 2017). Yin (2015) stated that in data analysis, it is important for researchers to manipulate data to derive possible themes to substantiate findings. Moreover, while Nepper and Chai (2016) highlighted the utility of researchers using codes to classify themes and sub themes during the interview process, Teruel et al. (2016) posited that researchers use of codes permits them to identify and document trends that they may find in data.

Thematic analysis, whereby researchers identify and record themes within data, is relevant to qualitative studies (Saunders et al., 2016). Researchers are widely using Microsoft Excel™ as a reliable tool in the data analysis process (Ose, 2016). After member checking, I used Microsoft Excel™ to analyze data by looking for common themes in the responses to each of the interview questions. As such, I coded all of the responses from the first interview into main and sub themes, looked for similar themes during subsequent interviews, and assigned the same codes if there are indeed similar themes in the subsequent interviews. I also applied methodological triangulation to verify or cross-check themes derived from interviews against themes I derived during the review of company documents and from direct observations. The grouping of similar codes assisted in the correct interpretation of data.

Bree and Gallagher (2016) stated that linking themes from data analysis to published research and conceptual framework demonstrates alignment in qualitative studies. In my literature review, I highlighted numerous financial and nonfinancial approaches that nonprofits have used to boost sustainability as well as the application of

systems theory to the operations of nonprofits. However, when coding data from interviews and other sources of information, researchers can uncover negative themes (Yin, 2016). During the data analysis phase, if themes arose that were not consistent with those found in the literature review and the conceptual framework, I would have assigned a unique code for further review of the literature to determine whether I can discover newly published studies to support the unique themes.

### **Reliability and Validity**

Unlike quantitative studies that incorporate various tests to confirm reliability and validity, qualitative studies encompass criteria that researchers and other users of information cannot easily measure. Nevertheless, researchers need to incorporate the necessary steps into their research so that it is reliable, meaning that other researchers can repeat the study and draw the same conclusion (Bolarinwa, 2015). Moreover, researchers need to ensure that their studies are reliable through its dependability and validity through its credibility, transferability, and confirmability (Elo et al., 2014; Morse, 2015).

#### **Reliability**

Researchers need to confirm that their study meets the reliability criteria so that users can have confidence that they can depend on the findings for decision-making processes and other purposes. Bolarinwa (2015) and Gaikwad (2017) posited that a study would pass the test of reliability when it is free from biases and other researchers can repeat the study to achieve similar results on a consistent basis. Moreover, researchers place a certain amount of trust in participants by assuming that the information they provide will be credible and reliable (Behrendt, Matz, & Goritz, 2017). Nevertheless, two

important processes in qualitative research that ensures dependability are triangulation and member checking (Morse, 2015). I used methodological triangulation because I collected data from more than one source and member checking because participants reviewed my interpretation of their answers to interview questions to verify the accuracy of such interpretations.

### **Validity**

**Credibility.** A study will stand the test of validity if it is credible or logical in its application to business practice. With regard to credibility, Heale and Tywcross (2015) stated that a study would be credible to the extent to which the researcher evaluated what he sought to evaluate. Further, Kihn and Ihantola (2015) noted that credibility would be evident if the data obtained by researchers clearly satisfy the purpose of the study. If the study does not achieve this feat, then the conclusions that the researcher derives will not be relied upon with any certainty. Cuervo-Cazurra (2016) stated that participants are the only ones who can dispute the credibility of information that the researcher presents. Therefore, the most appropriate way to ensure credibility is through member checking and through methodological triangulation to ensure that there are various sources to support conclusions. Multiple sources of data help to foster credibility, thus ensuring validity (Jentoft & Olsen, 2017).

**Transferability.** Regarding transferability, if users can apply the research to other scenarios, then the study will pass the test of transferability (Noble, 2015). In addition, researchers need to provide clear descriptions of the study to allow future researchers to apply it to their field of study (Saunders et al., 2016). To ensure that other users can use

my research with some level of certainty, I took great care in the data collection and analysis stages to verify my analysis of data and coding of themes. Moreover, because the purpose of this study is to explore successful sustainability strategies, managers of those nonprofits that are struggling to attain sustainability may be able to adopt similar strategies, which would confirm transferability. I also utilized member checking, interview protocols, methodological triangulation, and data saturation.

**Confirmability.** In ensuring confirmability, researchers make sure that the required persons review and certify information they gather and use for analysis, before they draw conclusions from such data (Nelson, 2016). Saunders (2015) also stated that researchers should use feedback from participants to achieve confirmability. Once more, the tools of member checking, methodological triangulation, and meticulous review of internal documentation foster conformity. Developing a good rapport with participants before and after the interview process also promoted confirmability and they were very open during interviews and very active in the member checking stages of the research.

**Data saturation.** Researchers achieve data saturation when they obtain no new information from interviews, observations, and document reviews (Saunders et al., 2016). Loh (2013) also stated that researchers employ member checking in the research process to ensure data saturation. Because researchers will base data saturation on the responses of participants, the first step was to ensure that my perception of the participants' responses is correct through member checking. Secondly, upon review of participants' responses and documentation, I conducted stringent data analysis on the information until no new themes emerge and there was no possibility for new coding of the information.

### **Transition and Summary**

The purpose of this qualitative multiple case study is to explore strategies that nonprofit managers use to sustain funding in the nonprofit sector. In this section, I explained my role as the main researcher and any relationships that I have with the research topic, as well as information on the participants, the research method, and the research design. I discussed the population and sampling technique that I will employ, ethical standards and data collection instruments, data collection and organizing techniques, and the process of data analysis in this study. Lastly, I highlighted the tools that I will employ to verify the reliability and validity of data through the adoption of dependable, credible, transferable, and confirmable standards.

After applying for and receiving IRB approval, I conducted interviews, which allowed me to complete Section 3. Section 3 will consist of an introduction, presentation of findings, application of the study to professional practice, implications for social change, and recommendations for action based on conclusions. The section will also include my recommendation for future research, my personal reflections on the DBA journey, and concluding remarks.

### **Section 3: Application to Professional Practice and Implications for Change**

#### **Introduction**

The purpose of this qualitative multiple case study was to explore strategies that nonprofit managers used to sustain funding in the nonprofit sector. Information came from interviews with three nonprofit leaders as well as the review of organizational documentation including annual reports and financial statements. The participants all fitted the criteria of: (a) being in the post for more than 5 years and had implemented or inherited successful strategies to sustain their organization, (b) were above the age of 21, and (c) the holder of at least a bachelor's degree. In addition, the organizations had been in operation for more than 10 years prior to the research, as this was an indication of sustainability.

I identified three strategies that interviewees implemented in their organization to remain sustainable: (a) effectiveness and accountability (b) relationship with partners and (c) revenue diversification. In the presentation of my findings, I described how the themes confirmed knowledge based on peer-reviewed literature identified in the literature review as well as recent literature published in 2019. I also demonstrated a connection of the findings to general systems theory, which was the conceptual framework that I applied for this research.

### **Presentation of the Findings**

The overarching research question for this study was: What strategies do nonprofit managers use to sustain funding in the nonprofit sector? Managers of three nonprofits participated in the study. I conducted semistructured face-to-face and online interviews with three nonprofit managers from three organizations, two in the Caribbean and one in the United States, and I reviewed documentation such as financial statements and annual reports, as well as the organizations' websites to answer the overarching research question. I also reviewed the vision statements and mission statements of the organizations and compared them with information derived from interviews. To verify confidentiality, I assigned the codes O1 to O3 to each organization and P1 to P3 to each participant. Three major themes emerged after data analysis, coding, and triangulation, as detailed in Table 1.

Table 1

*Major Themes Identified*

Themes	Frequency
Effectiveness and Accountability	93
Relationship with Partners	88
Revenue Diversification	76

**Theme 1: Effectiveness and Accountability**

The first major theme that emerged from the interviews and review of documentation such as financial statements and annual reports, was the need for the nonprofit to demonstrate effectiveness and accountability. Interviews and data analysis revealed that program effectiveness involves demonstrating value for money which increases the nonprofits' chances of attracting more funding from donors and other philanthropic bodies. P1 stated that "in the grant proposal from nonprofits, a major element is the ability of managers to demonstrate their organization's track record in the execution of projects." P1 further stated that "your capacity to demonstrate that you are implementing as per your implementation schedule is important and you have to show that if your implementation was in danger, that it was due to unforeseen issues."

The strategy employed by the nonprofit managers that I interviewed was in alignment with Samad, Arshad, Asat, and Kasim (2017), who concluded that nonprofits must demonstrate accountability and must learn to strike a balance between their responsibilities to communities and their responsibility to properly and adequately account for funds entrusted to them. In addition, Tacon, Walters, and Cornforth (2017) stated that accountability was a critical element in ensuring the success of nonprofits, while Krawczyk, Wooddell, and Dias (2017) found that when nonprofits have a good reputation, they are more likely to receive funding from donors. Further, recent research by Albu and Flyverbom (2019) concluded that funders of nonprofits require a high level of accountability which promotes financial sustainability.



Moreover, interviewees stressed the need for program effectiveness and accountability in their organizations because, as stated by P1 “as resources become scarce, funders will want to fund programmes that produce results.” P1 further elaborated that “there are certain acceptable levels of over and underspends but if it is more than an allowable level, then you can be in danger of losing funding.” P2 stated that “we must report to the government on a monthly basis how much money we spent and how many units of services we provided. They are very strict about this and we take it very seriously.” P3 stated that “we have to prepare monthly, quarterly, annual reports which include indicators which are updated with regard to our overall strategy.”

The responses by the interviewees are in alignment with peer-reviewed studies from the literature review and recent studies. The responses aligned with Lee and Clerkin (2017) who stated that it is extremely critical that nonprofits implement performance measurement and comprehensive systems of accountability to respond to donor requirements. The interviewees’ responses further aligned with the work of Rey-Garcia and Alvarez-Gonzalez (2017) who posited that there is a greater emphasis on accountability and transparency, especially after the financial crisis of 2008, so nonprofits have to incorporate those requirements in their work. The strategies are also in alignment with the conceptual framework as per the research of Frerichs and Dave (2017) who applied systems theory and found that a systems approach assisted in the engagement of stakeholders through efficient structuring and prioritization. Managers of nonprofits could succinctly structure and prioritize their operations by the application of a general

systems approach, which will assist those managers in being effective and accountable for resources bestowed upon them.

The interviewees were insistent that program effectiveness does not only involve execution of activities as agreed with funders and other partners but also involves governance. P1 stated that “efficient and timely reporting, enterprise risk management, and the frequency of audits are important to funders.” The issue of risk management was confirmed by Domanski (2016) who stated that nonprofit managers should be aware of the risks facing their organizations, while Leardini, Moggi, and Rossi (2019) noted that strong governance improves the legitimacy of nonprofits. With regard to the conceptual framework, Bridgen (2017), posited that systems theory was ideal in assessing the strengths and weaknesses of organizations.

Managers of struggling nonprofits should apply systems theory to look at all facets of their operations to see whether their systems are robust enough to give donors the confidence to support their cause. The strategy of strong governance and risk management as articulated by the interviewees further aligned with Pettijohn and Boris (2018) who stated that the relationship between nonprofits and donors depends on various factors such as location, culture, and operational risk; therefore, nonprofit managers should incorporate those factors into their operations and workplans. The strategy of enterprise risk management further aligned with the conceptual framework based on the results of the study conducted by Whitney, Bradley, Baugh, and Chesterman (2015) who applied a systems theory to explore strategies that identified risk in projects in the early

stages of project design, and found that systems theory was useful in eliminating risk at the onset.

Regarding effectiveness and accountability, the interviewees further posited that the ability of the nonprofit to effectively communicate the benefits of the work that they are doing is also essential in demonstrating to donors, partners, and the public that they are making a positive impact in communities by improving the lives of residents. P2 stated that:

it is critical to ensure that the services we provide are of a high standard, or else we stand the risk of losing funding from the Government, or private persons can use other organizations for the same services that we provide.

The position of the interviewees aligned with peer-reviewed studies such as the research by Lopez-Arceiz, Pèrezgrueso, and Torres (2017) who stated that accessibility and transparency assist tremendously in the raising of financial resources and leads to improvement in overall performance, because there will be more confidence in the nonprofit. In addition, the strategy of the nonprofit managers that I interviewed is also in alignment with Smith and Phillips (2016) who concluded that nonprofits need to ensure that they continually give donors information on the impact of the work that they are conducting so that donors will be aware of the true value of their donations.

Insomuch as demonstrating program effectiveness is critical for nonprofits, the interviewees posited that nonprofits need to sell their success. Anagnostopoulos et al. (2017) noted that nonprofits develop effective strategies to communicate the work that they execute in communities, to reach a wide range of stakeholders. P1 stated that:

nonprofits need a proper communication strategy and need to employ social marketing to make sure that they target strategically, that is, the widest possible group of stakeholders because when persons are analyzing the effectiveness of projects, they go to the communities in which they claim to serve to see if they are known in the communities.

Nonprofits also act as a channel of communication between Governments and citizens due to a better understanding of social issues, thereby bridging the gap between politicians and the people that they represent (Kim & Mason, 2018).

To promote effectiveness and accountability, the nonprofit managers that I interviewed also outlined the importance of internal assessments to determine their organizations' capacity through gap analysis. P3 stated that "after the gap analysis, leaders of my organization, look at the critical gaps and what resources are needed to fill them, considering that some gaps may require financial resources while some can be filled by volunteers," i.e. human resources. A recent study by Millesen and Carman (2019) concluded that self-assessments allow nonprofits to take the necessary steps to strengthen their performance and boost sustainability. With regard to alignment with the conceptual framework, the strategy applied by the nonprofit leaders that I interviewed also aligned with researchers such as Adoko et al. (2015) who used systems theory to explore strategies to enhance project success and found that projects are becoming more complex. As a result, nonprofit managers need to employ better planning, analysis, coordination, and supervision to meet project deliverables. Table 2 includes a summary

of additional responses from each participant with regard to promoting effectiveness and accountability within nonprofits.

Table 2

*Theme 1: Effectiveness and Accountability*

Participant	Summary of Participants' Comments
P1	<p>P1, who is the manager of nonprofit O1 operates in lesser-developed and developing nations, mentioned that the first step in applying for grants from donors, whether from Government or other bodies is the preparation of the grant proposal. P1 elaborated that donors are keen to assess, based on that previous track record, how effective the nonprofits have been in accounting and executing on funding provided from them as well as other donors.</p> <p>In order to ensure efficiency, P1 stated that it is important to appreciate and consider the views of members of the team so at O1, leaders would look at the problem and get everyone to present their ideas so that everyone has a part to play. In addition, when the nonprofit takes this approach and a strategy is crafted, everyone will have ownership because they helped to create it. P1 further elaborated that in the development of strategies, the approaches of the nonprofit have to be frequently reviewed and this must be an ongoing exercise.</p>

*(table continues)*

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Participant	Summary of Participants' Comments
P2	<p>P2, whose nonprofit O2 is in the service industry and operates in the United States of America (US), stated that 1/3 of the Organization's funding is derived through Government grants, so accountability for funds received is of paramount importance. In addition, another 1/3 of funds are also received from the Government for the provision of services as well as from private persons who can afford it. Ecer, Magro, and Sarpca (2017) stated that in making decisions about providing funding, donors consider how effectively nonprofit managers execute their activities which aligns with the strategies employed at O2. P2 stated that because funding is also derived from private sources, like most private sources, they want to be satisfied that the services they are receiving for their funds are value for money and that the service is being administered as effectively as possible.</p> <p>The final 1/3 of funding received by O2 is received from philanthropic sources who also stress on program effectiveness and accountability. P2 further stressed the importance of program effectiveness and accountability with regard to funds from philanthropic sources because the organization made a concerted effort to reduce their reliance on Government funding which was over 80% in previous years. As the organization attracted more Philanthropy, there were able to reduce their reliance on Government funding which can become fragile, so the organization emphasizes the need for effectiveness and efficiency.</p>

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*(table continues)*

Participant	Summary of Participants' Comments
P3	<p>With regard to the development of strategies to ensure effectiveness and accountability, P3 stated that O3 has to change strategies annually to ensure that they promote effectiveness and accountability. O3 also concentrates on its reputation, branding, awareness, and relationship building, which allows partners to see the direct and indirect benefit of collaborating with the nonprofit. P3 further stated that efficiencies are developed over time and informed that leaders in O3 would meet as a team and do rapid gap analysis and situational analysis, and would consider disruptive innovations and dare to do things differently. P3 elaborated that leaders in O3 would consider how the Organization could implement their work in a manner that no other Organization has done before. P3 stressed the need for managers to be focused on being strategic in the approach to their work so as to promote efficiency in execution and they also need to be creative and innovative.</p>

## **Theme 2: Relationships with Partners**

The second theme that emerged from interviews, member checking, and document reviews was the need to promote excellent relationships with partners. Interviewees highlighted the importance of leveraging as an important tool to obtain support from Governments as well as other partners or donors. Stadtler and Lin (2019) stated that organizations need to have a better understanding of partners to promote collaboration. P1 stated that “leveraging involves networking with organizations in the sector in which the nonprofit operates so that they will see their success, and they would

want to be aligned with the organization.” P1 also stated that “giving other organization a share of the cake can result in them providing funds and recognition in the public relations stages of project execution.” P2 further stated that “our nonprofit puts the needs of funders at the forefront so whatever they require, whether financial reports or information on the work of the organization, we would ensure that we provide the information within a short space of time.” P3 also stated that:

our organization would do research on donors and corporate entities to see what they were passionate about to determine if our work is in alignment with theirs, as well as looking at cross-cutting themes between our organization and partners.

P3 also elaborated that at O3, “our leaders would also request meetings or find a champion who arranges meetings to present proposals to possible philanthropists.” P3 further stated that:

in harnessing our relationship with partners, we would identify policies or drivers indigenous to the partner organizations in terms of what they want to accomplish in the long and short term and determine how our nonprofit could contribute to the cause.

The strategy of the nonprofit managers that I interviewed confirmed to the finding of Garcia-Rodriguez, Rey-Garcia, and Sanzo-Perez’s (2017) who posited that nonprofit leaders must focus on relationships to achieve their missions and ensure long-term sustainability. The strategy of leveraging is also in alignment with the research of Pressgrove (2017) who concluded that organizations which adequately manage their relationship with stakeholders would be more successful, and with Alvarez-Gonzalez,



Garcia-Rodriguez, Rey-Garcia, and Sanzo-Perez's (2017) who posited that nonprofit leaders must focus on relationships to achieve their missions and ensure long-term sustainability. Furthermore, in alignment with the conceptual framework, Dodd (2016) applied systems theory to investigate the importance of public relations to organizational viability and found that public relation was the social capital of nonprofits and is just as important as other forms of capital.

The strategy of donor relationship that the interviewees applied, also aligned with the research of Drollinger (2018) who stated that positive engagement with donors has a positive influence on the behavior of the donor. In addition to systems theory, Bacq and Eddleston (2018) found that social enterprises operate under tremendous challenges and by adopting a stewardship theory approach, nonprofit managers will be able to effectively engage stakeholders with the possibility of attracting increased support, whether from the Government or other sources. Asheghi-Oskooee and Mazloomib (2018) also concluded that the adoption of stewardship theory by leaders may result in improved performance.

The interviewees elaborated on the need for the building of strong alliances with nonprofits who provide similar services. The interviewees further elaborated that as a result of the positive impact of their work, other stakeholders may be motivated to learn about the services that the nonprofits provide and may decide to contribute. The strategy of the interviewees relating to building alliances is in conformity with Starnes (2015) who applied the systems theory framework to research and found that managers need to establish alliances to be competitive within their operating environment. The strategy also aligned with the work of Harris and Ruth (2015) who stressed the importance of

nonprofit managers implementing policies that attract supporters to their cause. Harris and Ruth (2015) further posited that nonprofit managers need to put the necessary steps in place to maintain the support to be successful in the execution of their mission.

The strategy of building alliances also aligned with the research of Moldavanova and Goerdel (2018) who highlighted the importance of social relationships and connections as a pre-requisite for sustainable operations of nonprofits. With regard to alliances, Gazzola, Ratti, and Amelio (2017) also stated that it is imperative that nonprofits not only know their stakeholders, but they should make an effort to understand them. A recent study by Saebi, Foss, and Linder (2019) also found that donors prefer to support organizations that have similar visions and missions, thus highlighting the importance of building strong alliances.

A major challenge highlighted by the interviewees in maintaining relationships with partners; however, lies in the presence of constant change, especially at the Governmental level. P3 stated that for their organization O3, "since we have a lot of collaboration with the Government, there is usually a shock when Governments and persons within the Government change, thus affecting our access to persons who approved funding." With regard to challenges from changes in the funding environment highlighted by the participants, George (2017) applied general systems theory and concluded that integrated systems must have the ability to adapt to changing environments to remain sustainable. Also, with regard to resilience to shocks and constant change, Carlisle (2015) applied a systems theory perspective and found that resilience is a critical feature for managers to develop and foster to have an in-depth

understanding of the various elements of a system, which will allow them to deal with negative shocks.

Interviewees noted that one important aspect of cultivating excellent relationships with partners lies in an organization's ability to coordinate not only with donors and other funders but also with other nonprofits, especially those in the same field or area of operations. Cadet and Carroll (2019) stated that nonprofits compete for funds and P3 stated that "there must be a good level of collaboration because the pie is getting smaller so donors are asking for collaboration with other nonprofits because they are aware that individual organizations can be less sustainable on their own." P1 further stated that "funders realize that by supporting more collaborators, the possibility of success is greater, and the reach would be larger, which is what funders hope for from a strategic point of view." Moore et al. (2018) stated that managers need to fully appreciate that there is a system of interconnectedness within the operating environment and understanding that interconnectedness will lead to internal adjustments, which can promote sustainability. Similarly, Waller, Fawcett and Johnson (2015) found that by applying systems thinking to operations, organizational leaders, realizing that they are part of a system, can share information with each other which can boost performance and enable sustainability.

On the topic of collaboration, P3 was adamant that "in order for sustainability to take place, nonprofit managers need to be more creative and innovative, and there must be invaluable partnerships with donors and other civil society." With regard to the alignment of Theme 2 with the conceptual framework, Turner and Endres applied general

systems theory and found that having internal strategies that do not consider external forces limits the sustainability prospects of organizations. In recent studies, Zeimers et al. (2019) and Atouba (2019) highlighted the importance of collaboration and building partnerships, to the execution of social work. In addition, Mania-Singer (2017) stated that all sub-systems within a system depend on each other and can help each other to attain sustainability. The collaborative approach by the nonprofit managers interviewed, also aligned with the conceptual framework through research by Sayin (2016) who concluded that leaders use systems theory to assess the interactions between the various tenets of a system to gain a better understanding. Table 3 is a summary of additional responses from each participant with regard to developing excellent relationships with partners

Table 3

*Theme 2: Relationships with Partners*

Participant	Summary of Participants' Comments
P1	P1 stated that in a number of cases, initiatives that the previous Government spearheaded that benefited the nonprofit, were shelved and they were required to resubmit workplans and funding requests to the new government personnel, which took time and in some cases were not approved. P1 stated that "The organization approached the government for funding for operational expenses which sometimes worked well because there was a good relationship for example with the person that did the cabinet note. However, when governments changed, the

*(table continues)*

Participant	Summary of Participants' Comments
P1 cont'd	<p>organization was forced to resubmit proposals and start the entire process once more, which was very time-consuming." P1 further stated that in some cases, the nonprofit had to undertake projects outside of the traditional models in order to satisfy the requirement of new Government leaders which was not always possible.</p>
P2	<p>P2 stated that "it was also critical to build relationships with funders and ensure that their needs were met with regard to information they requested whether narrative or financial reports." P2 also stated that "the challenge is to find new donors and retain them because the top donors from 25 years ago are dead so there is a need for constant re-acquisition of donors, and their families may or may not continue the commitment to the Organization." P2 further stated that the major challenge of O2 is maintaining new donors and always trying to bring new people in the door."</p>
P3	<p>One strategy that worked well for O3 was to ask current donors to host functions with their friends, where they promoted the work of the organization which resulted in new donors always being introduced to the work of the organization and want to contribute. P3 also stated that one of their funders would invite their friends on birthdays to partake in work for the nonprofits for that day. P3 stated that the initiative helped O3 to attain a database of persons whom they could approach to support the work of the nonprofit. Additional persons that O3 got on-board were</p>

*(table continues)*

Participant	Summary of Participants' Comments
P3 cont'd	<p>also able to conduct other activities that resulted in additional persons being introduced to the work of the nonprofit which tremendously benefited the work of the organization.</p> <p>P3 stated that the ability of the nonprofit to adequately attract and manage donors depends on the managers' understanding of the society in which the nonprofit operates. The society in which their nonprofit operates is very cliquey and as a result, if one person is involved, that would attract persons from their network to join as well.</p> <p>According to P3, changes in the private sector also affected O3's ability to partner with those organizations because new Chief Executive Officers (CEOs) would arrive with different visions and different drivers from that of the previous CEO, which the nonprofit had to adapt to if they wanted to continue receiving funds. In those cases, P3 mentioned that the nonprofit had to get approval from organizational Leaders, especially those in headquarters since O3 operated in the Caribbean but the headquarters were based elsewhere. It is imperative; therefore, that leaders recognize the challenges that nonprofits face, especially those located in lesser-developed or developing countries so as to craft strategies to be sustainable.</p>

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### **Theme 3: Revenue Diversification**

The third theme that emerged from interviews and data collection was the need for the nonprofit to have various sources of revenue, which the nonprofit managers

interviewed all noted was of grave importance in boosting and maintaining the sustainability of operations. P1 stated that “the greatest indicator of sustainability is the existence of a pool of funds that is available over the long term from a reliable and diverse group of partners.” P2 stated that “our organization is always seeking new avenues to expand our funding base.” P2 further posited that:

over the past years, there has been an explicit effort to diversify funding portfolio and to ramp-up fundraising because management felt that it was too risky to be over-dependent on Government funding hence the move towards other forms of funding.

P3 stated that “organizations need to find ways to fund operations from sources other than from external sources since that funding is not always secure.”

The strategy of revenue diversification as indicated by the interviewees is in alignment with the conclusion by Amagoh (2017) that having a diverse source of funds promotes sustainability within nonprofits. A recent study by Hung and Hager (2019) also confirmed the strategy by the managers in stating that organizations with few funding sources will have limited financial health. Similarly, in another recent study, Mendoza-Abarca and Gras (2019) posited that revenue diversification provides immeasurable benefits to organizations and boosts their legitimacy. In conformity with systems theory, Carlisle (2015) stated that an understanding of the various parts of a system results in the development of flexible strategies for the generation of funding.

Nonetheless, P1 stated that “funding sources are uncertain and organizations can write the best proposals, but the funds that the nonprofit receives ultimately depends on

the availability of donor funding and other external factors.” Therefore, nonprofit managers have to ensure that the organization always has a stopgap mechanism, especially with regard to finance being lined up to fund operations; thus the organization will not be forced to lose staff. Shea and Wang (2016) also concluded that there are many factors, both internal and external that affect decisions with regard to financing available to nonprofits. The strategy of the interviewees also aligned with Strong (2018) who stated that managers operate under tremendous challenges, which requires a full understanding of how various aspects function to maximize revenue potential.

Interviewees elaborated that in an environment of reduced funding, nonprofit managers have the responsibility of seeking funding from various sources, including private sources. Participant P3 stated that “allowing corporate entities to see the direct and indirect benefit of partnering with the Organization is critical.” In addition, P1 posited that “getting the brand out there and getting testimonials about the work of the organization is key and it is important to get persons to feel so that when they hear the name of the organization they will want to contribute time and money.” It is imperative; therefore, that nonprofits demonstrate to funders and other providers that they are able to achieve what they promise with scarce resources.

With regard to innovative ways of revenue diversification, the interviewees stated that nonprofit managers need to cultivate personal relationships as well as build political clout as an Organization. P1 posited that “there are avenues that nonprofits can tap into such as an endowment that can grow and earn reliable funding.” P1 further stressed that “revenue diversification is a holistic venture that should not be divorced from other



aspects of the nonprofit's work." In alignment with P1, Păceșilă (2018) stated that endowment was a good means of ensuring financial sustainability. In addition, Ferreira, Zanini, and Alves (2019) stated that managers should look at investments that minimize risks and maximize returns.

With regard to revenue diversification, the interviewees also informed that their organizations promote vision sharing so that everyone would have a shared understanding of what the strategic plans are and where the organization is heading. The participants also stated that one person alone could not have the vision, but they need to galvanize others to the cause, especially in looking at creative ways to obtain funding. Brown (2016) and Castillo (2016) concluded that nonprofit managers should continually reintroduce employees to the goals and values of the organization so that they are better equipped to serve their stakeholders. In addition, Norris-Tirrell, Rinella, and Pham (2018) stated that nonprofits could not be successful and remain sustainable unless there is strong and effective leadership. In a recent study, Lincoln, Partner, and Edwards (2019) also concluded that when nonprofit leaders are passionate about their mission, there are improved prospects for sustainable programming and funding. In another recent study, Wijaya (2019) stated that when employees have a voice in what the organization does, they tend to be more involved. Table 4 is a summary of other responses from each participant with regard to revenue diversification.

Table 4

*Theme 3: Revenue Diversification*

Participant	Summary of Participants' Comments
P1	<p>For O1, leaders evaluate the success of their sustainability strategy based on the capacity of the nonprofit to sustain itself for a targeted number of years. Another important aspect of revenue diversification lies in the ability of nonprofits to demonstrate to donors that they can also contribute, even in small part, to the project that they are requesting funding for, or else the donor would not provide funding. This is known in the nonprofit world as making a counterpart contribution or an in-kind contribution. P1 informed that “Organizations need to show a counterpart contribution and they can use various means such as the use of volunteers and other members of the organization and charge the work they do to the project as the in-kind contribution.” The counterpart/in-kind contribution is essential because if Organizations cannot show that they are able to make a contribution to the project, then donors will be hesitant to contribute to the Organization. Nonprofits; therefore, need to find innovative ways to fund their counterpart portion. P1 further elaborated that even with additional revenue sources, if donors do not see that you are contributing to complement their funds in a project, they would not be inclined to give the nonprofit the support that it is requesting.</p>

*(table continues)*

Participant	Summary of Participants' Comments
P2	<p>P2 also informed that there were private firms that are in the business of assisting organizations in increasing their funding base. P2 gave an example of The Benevon Model for creating sustainable funding for nonprofits which is administered by a private firm called Benevon and is targeted towards engaging and developing long-lasting partnerships with donors and other providers of assistance to nonprofits.</p> <p>There are many elements that must be in place before nonprofits can exploit funding opportunities. One such element is location and P2 stated that they were able to attract numerous persons to access their services because they are located in a very affluent part of the country. P2 also stated that it is critical that managers know what their niche is so that the organization will be able to provide a service that none-to-few other organizations are involved in. The service that O2 provides is one in which the majority of persons will access at one point of their lives so it gives them the edge over other organizations that depend on the tastes of individuals for example.</p>
P3	<p>In addition to managers, it is critical that other leaders also have a mindset to promote efficiency and boost the nonprofit's ability to attract funding. P3 stated that the inclusion of board members who were from private entities led to more efficiencies because it led to better strategies to operate more efficiently with a profit-making mindset and persons from the private sector concentrated on accountability and value for money.</p> <p>P3 elaborated that "during the 2008 crisis, there was limited funding available</p>

*(table continues)*

Participant	Summary of Participants' Comments
P3 cont'd	for international development and when that happens, if you purely rely on external funding, you will fold." P3 further stated that "crises also affect Governments capacity to pay contributions to organizations, especially those economies that depend heavily on tourism, therefore; it is important to find the niche that the organization has so that it can sell its service."

### **Application to Professional Practice**

Nonprofits continue to operate under tremendous constraints due to severe reductions in the funding environment (Topaloglu, McDonald, & Hunt, 2018). Alvarez-Gonzalez, García-Rodríguez, Rey-García, and Sanzo-Perez (2017) stated that economical and societal issues negatively affect the efficient functioning and sustainability of nonprofits. Further, the sustainability of nonprofits is critical to professional practice because nonprofit organizations account for 10% of workforce in the United States of America and funders provide over 300 billion to nonprofits annually which underscores their impact on economies (Garven, Beck, & Parsons, 2018). The findings of this study could provide nonprofit managers with a framework for ensuring sustainability by applying the highlighted themes to their organizations to ensure continual service provision to communities in need.

Based on the findings of my research, managers of struggling nonprofits could implement three successful strategies as follows: (a) adopt efficiency and accountability in their operations (b) promote excellent relationship with partners and (c) promote

revenue diversification, to boost their chances of sustainability. Leaders of new nonprofits or those nonprofits that are in the stage of being established can also apply the strategies to their organization to improve their chances of sustaining operations. To complement the sustainable strategies, successful nonprofit managers who were interviewed highlighted the critical element of all persons in the organization having a shared vision. If the leaders are the only ones who are concerned with sustainability or are the only ones that are willing to do what it takes, the organization will not succeed.

The first strategy of adopting effectiveness and accountability in operations is critical to the success of any nonprofit because it embodies the reputation of the nonprofit. Krawczyk, Wooddell, and Dias (2017) stated that donors provide funding to nonprofits that have a good reputation. Canfield and Anzola (2018) found that when organizations have a proven track record, the possibility of raising capital increases. Nonprofit managers must be cognizant; however, of the fact that funders do not only want to see that the nonprofit is spending and executing activities, but they want to see that the activities are contributing to expected higher-level outputs and outcomes (Chatterjee & Rai, 2018).

Regarding the second strategy of promoting excellent relationship with partners, nonprofit managers should pay keen interest. Drollinger (2018) stated that partners' or donors' attitudes are premised upon their interactions with the nonprofits. Participants mentioned that nonprofits could be executing well as per their agreement with the partner, but if there is not a good relationship with the partner, the nonprofit's chances of attaining additional support could be affected. Interviewees mentioned several factors

that contribute to a positive relationship with partners including submission of regular and timely reports and promoting the donor when executing activities.

Lastly, the importance of nonprofits implementing strategies to diversify their revenue base cannot be emphasized enough. Nonprofits that have several sources of funding will be more resilient to shocks and changes in the funding environment than those with a few. Hung and Hager (2019) postulated that nonprofits with limited sources of funding face sustainability issues. Nonprofits in the Caribbean region that depend heavily on donor funding from European and American sources should be more cognizant of the need for revenue diversification because changes in the political landscape of those countries can severely affect funding available to those nonprofits.

### **Implications for Social Change**

The work that nonprofits perform in communities is extremely critical to improving the well-being of residents of those communities. Sledge and Thomas (2019) noted that some nonprofits serve entire communities and not just a specific group. Sledge and Thomas further concluded that nonprofits adapt quickly to provide services to vulnerable populations that may be ignored by their Governments. Therefore, if nonprofits are unable to remain in operation, the result could be a major loss for persons living in underprivileged communities. Nonprofits are also important with regard to their contribution to economic activities in communities in which they operate (Carvalho, Ferreira, & Silva, 2019).

It is critical that nonprofits remain in operations to continue serving communities. Therefore, if struggling nonprofits implement the successful strategies that I highlighted

and it leads to sustained operations, there would be a positive social benefit to communities. Sustained operations of nonprofits can also lead to more employment opportunities for members of communities and opportunities for residents, especially younger persons to develop vocational skills. Barbetta, Canino, Cima, and Verrecchia (2018) conducted a study of nonprofits over a 10 years' period and found that there was a 61% growth in employees and 43% growth in volunteers over that period. Many nonprofits also use youth in their operations, whether as members of staff, on-the-job trainees, interns, or volunteers, which provide them with much needed skills to operate in the world of work, which may lead to an improvement in their standard of living.

If nonprofits successfully apply the sustainability strategies of: (a) effectiveness and accountability (b) relationship with partners and (c) revenue diversification, other nonprofits could be established with similar successful sustainable strategies leading to additional employment and economic activity in communities. Nonprofits contribute to improvement in the standard of living of underprivileged individuals (Carvalho, Ferreira, & Silva, 2019). Therefore, as more nonprofits are established and are successful by incorporating: (a) effectiveness and accountability (b) relationship with partners and (c) revenue diversification into their operations, there could be countless new lives being touched and standards of living improved in communities.

### **Recommendations for Action**

Since the purpose of this research was to explore strategies that nonprofit managers could implement to sustain funding, I would recommend that nonprofit managers consider implementing the strategies that the interviewees highlighted. With

regard to operating effectiveness and accountability, managers of struggling nonprofits should review their operating procedures to ensure that they are effective in their execution of activities, and that they are adequately accounting for resources bestowed to them. Ito and Slatten (2018) stated that nonprofits are under more scrutiny than before, and managers need to assess which strategies help them to be more effective and accountable to their stakeholders. Good, Maragno, and Borba (2018) also posited that operating performance and accountability are powerful tools available to nonprofit managers to improve their ability to attract funding from stakeholders. Managers of nonprofits who may not be struggling with sustainability issues should also review their operations to safeguard that issues do not befall them in the future because of a lack of proper execution and accountability.

Nonprofit managers should pay keen attention to the second strategy of fostering excellent relationship with partners. Based on data analysis, the process of fostering excellent relationships with partners included leveraging, ensuring alignment with the work of partners, and building strong alliances with similar nonprofits. Pettijohn and Boris (2018) noted the importance of maintaining excellent relationships, especially with key funders such as the Government. Based on data analysis, managers of nonprofits with large Government funding should ensure that the relevant reports and other information requested by Government officials are submitted on a timely basis and as per agreed frequency. Pettijohn and Boris further elaborated on the need for nonprofit managers in the US to cultivate an excellent relationship with Governmental bodies, especially since nonprofits located in different states have different nonprofit cultures and different types



of funding arrangements. Many organizations have entire departments dedicated to partnerships with stakeholders including other nonprofits, which managers should incorporate into their organizational structure and strategy.

Regarding revenue diversification, I would recommend that nonprofit managers implement strategies to diversify their revenue base. Strategies highlighted by the interviewees included ensuring that there are several sources of revenue, partnering with private funders, vision sharing within the organization, and cultivating personal relationships as well as political clout. Hung and Hager (2019) noted the limitations of having few sources of revenue, so nonprofits need to implement strategies to attract additional sources of revenue. Furthermore, Crisan and Dam (2018) stated that nonprofit managers can achieve sustainability by having diverse sources of revenue. One important aspect of revenue diversification is for nonprofit managers to determine what niche their organization possesses and develop strategies to exploit those strengths.

There are various nonprofit journals in which I can disseminate the results of the study, albeit in a condensed form. The results of the study will also be shared with the interviewees and any other nonprofits that request a copy. I am confident in the results of the study and I will attempt to disseminate the results wherever I can, including requests for presentations at conferences and seminars. I also belong to several nonprofit networks on social media with over 100,000 users, so I can post summaries of my research to those platforms so that interested persons can be informed.

### **Recommendations for Further Research**

There are nonprofit organizations operating in all corners of the world, and they vary in areas of work, size, and complexity. Bixler and Springer (2018) stated that nonprofits operate in various sectors including public health, social inequality, and the environment, among other sectors. There were three participants in this study, one in the US and two in the Caribbean countries of Guyana and Trinidad. I would recommend that future researchers concentrate on more states in the US as well as other Caribbean countries.

Future researchers can also limit their study to nonprofits in a specific sector so that the research will be more identifiable and applicable. For example, future researchers could concentrate on nonprofits that provide public health services. Also, because nonprofits have varying sizes and structures, researchers can limit future studies to nonprofits of the same size so a recommended approach could be to separate future studies by small, medium, and large nonprofits. Because I only highlighted three successful strategies, future researchers could explore additional strategies that nonprofit managers have used to promote sustainability. In addition to exploring successful strategies, it would be worthwhile to explore the strategies that unsuccessful nonprofits used so that other nonprofit managers could avoid those pitfalls.

Having laid the foundation by identifying three successful strategies, future researchers can use a multiple case study approach to assess each of the three themes to assess how nonprofit managers have implemented them to promote sustainability. By exploring the application of each strategy among several nonprofits, researchers will be

able to make a like for like comparison among nonprofits to determine the impact of that single strategy in the various nonprofits. I would also recommend that future researchers use a mixed method research methodology by utilizing quantitative techniques to analyze the large amount of data that was involved at the data collection stage including data from financial statements and annual reports.

### **Reflections**

The DBA journey has been a very challenging and yet rewarding experience for me. Having started this journey in 2015, there were several periods where I needed to take a break from studies because of positive changes in my work life which demanded a great portion of my time. The DBA doctoral study process has enlightened me on the strategies that nonprofit managers need to implement to give their organizations a chance of becoming or remaining sustainable. Further, I learnt a lot about data collection, data analysis, as well as ethical standards in research that I was never aware of prior to my DBA journey.

Having worked in the nonprofit arena for over 10 years, I have seen the challenges that nonprofit organizations face in striving for sustainability. However, I have never been involved in the setting of strategies to enable organizational sustainability, so the results of the research were an eye-opener for me. Nevertheless, I did not allow any personal biases or preconceived ideas to bear fruit during the research, and I did not influence the responses of the interviewees in any way, and I also followed the interview protocol (Appendix B).

I do not think that the interview process had an effect on any of the participants because the information that they provided was in line with their everyday work. However, I think that when I share the results of the research with them, they might be surprised to find that other nonprofit managers share common thoughts and challenges as they do. This realization could lead to great collaboration in finding ways to alleviate common challenges.

### **Conclusion**

Nonprofit organizations continue to face issues with the sustainability of funding as the financial resources available for nonprofits continue to decline. In a recent study, Morse, Roberts, MacIntosh, and Bordone (2018) concluded that some nonprofit managers do not have funding to sustain their organization for more than 1 month, while Gajdová and Majdúchová (2018) stated that many nonprofits struggle to attain financial sustainability. It is imperative, therefore; that nonprofit managers implement strategies to sustain funding in their organization, or else the nonprofit could cease to operate, thus affecting those in need within communities.

I identified three strategies from my research based on interviews and review of organizational data, which the interviewees implemented in their organization, to great success: (a) effectiveness and accountability (b) relationship with partners and (c) revenue diversification. As a result, leaders of nonprofits who are unable to sustain funding could implement the strategies in their organizations so as to remain in operations, thus enabling them to execute their goals and mission. There were 1.6 Million nonprofits registered in the United States alone in 2015 (Johnson, 2019), so the

competition is great in the nonprofit world for scarce resources. The large number of nonprofits that are currently in operation also underscores the need for managers to strongly consider implementing the strategies of: (a) effectiveness and accountability, (b) relationship with partners, and (c) revenue diversification to take advantage of the support available from the government and other philanthropic sources.

The environment in which nonprofits operate is a very dynamic one which can change at any moment. As indicated by the interviewees, there could be changes in Government, changes in the direction of partners, or the death of philanthropists that cause shocks in the funding available to nonprofits. The strategies of: (a) effectiveness and accountability, (b) relationship with partners, and (c) revenue diversification that I identified could be relevant now, but not so relevant a decade from now. Therefore; nonprofit managers must be strategic in their planning so as to anticipate shocks and put steps in place to address them. Rüsç, Wilkesman, and Bastani (2019) found that managers need to anticipate developments in their field and introduce unique ways of addressing any concerns before other organizations do. Hence, after nonprofit managers have implemented sustainability strategies, they need to constantly review their operations to verify that they are accounting for current sectoral circumstances.

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## Appendix A: National Institute of Health Certificate of Completion for Protecting Human

## Research Subjects

## Protecting Human Subject Research Participants



## Appendix B: Interview Protocol

<b>What you will do</b>	<b>What you will say-script</b>
Introduce the interview and set the stage.	Thank you once more for agreeing to this interview. As per the signed consent form, please confirm once more that I have your permission to record this interview and take notes. I will ask eight questions and ask follow up questions where I deem necessary. Can we start?
<p>Say the participant code before interview questions</p> <p>Write the participant code at the top of the note sheet</p> <p>Watch for non-verbal queues</p> <p>Paraphrase as needed</p> <p>Ask follow-up probing questions to get more in-depth</p>	<p>What strategies do you use to sustain funding?</p> <p>What process did you follow to develop strategies?</p> <p>What elements were critical for your organization in the implementation of the sustainable strategies?</p> <p>What were some of the obstacles that you faced in implementing sustainability strategies?</p> <p>What process did you use to overcome the obstacles?</p> <p>How do you evaluate the effectiveness of your sustainability strategies?</p> <p>How often do you review your sustainability strategies?</p> <p>What would you like to add that would further my knowledge with regard to sustainability strategies?</p>
Wrap up interview thanking participant	Thank you once more for agreeing to the interview and your candid answers to my questions.

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Schedule follow-up member  
checking interview

The next step in the process is for me to send you a transcript of this interview. I would be grateful if you would carefully review the transcript for completeness and make any additions or deletions where necessary. Is it okay if I email the transcript to you?

In addition, can I contact you in the event that I have follow-up questions?

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