2017

Effective Leadership and Nonprofit Sustainability

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This is to certify that the doctoral study by

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Abstract

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MS, DeVry University: Keller Business School of Management, 2012

BS, University of Maryland: University College, 2001

Doctoral Study Submitted in Partial Fulfillment

of the Requirements for the Degree of

Doctor of Business Administration

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January 2017

Abstract

A sustainability plan of an organization is useless without effective leadership in its design and execution. The purpose of this case study was to explore strategies that church leaders having at least 7 continuous years of organizational fiscal sustainability and leadership used to ensure fiscal sustainability. The study included 8 face-to-face and 2 phone interviews with 4 senior pastors, 3 associate pastors, a treasurer, a finance committee chair, and a certified public accountant who lived in the Akron, Ohio area along with a review of documents including a leadership meeting agenda and financial committee meeting agenda, provided by study participants. The transformational leadership theory was used to frame this study. Audio recordings were transcribed and analyzed along with interview notes and publicly available documents to identify themes regarding strategies used by church leaders to successfully achieve fiscal sustainability. Data analysis consisted of coding, thematic analysis, and key word analysis, which resulted in 4 major themes: mentoring strategies, where a pastor might get some good advise from someone knowledgeable about fiscal sustainability; training strategies on subjects like planned giving; education strategies on the use of websites and social media tools to improve the effectiveness of fundraising activities; and the importance of choosing the right leadership style as a strategy in improving fiscal sustainability. These strategies may contribute to social change if they are used by pastors and other church leaders to ensure fiscal sustainability in their organizations. Social implications may include increased attention on the varied benefits of sustainability and their adoption by individuals, businesses, organizations, governments, and society.

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Dedication

All that I am and strive for in life is dedicated to the honor and glorify my Lord and Savior Jesus Christ. I dedicate my doctoral study to my family matriarchs, my late great-great grandmother, Gertrude Letterlough Gleaves, and my late great aunt Vivian Bernice Gleaves Willams. Their sacrifices and encouragement continue to serve as examples by which to follow, promoting God, family, and education as the keys to successful lives and happiness. I will keep their memories, passion, determination, and dedication to family in my heart, mind, and spirit. My promise is to always do my best and never give up to attain my goals and objectives through the usage of those tools and resources divinely purposed in my life, and embrace the responsibility and honor to help others achieve their life's ambition and promises.

Acknowledgments

I first acknowledge the strength, determination, and fortitude afforded me by my Lord and Savior Jesus Christ, without whom this would have never been possible. Second, I acknowledge my parents Mary L. Wright and Charles H. Wright for accompanying and supporting my through my entire educational journey from an associate's degree to my doctorate. To my wonderful wife, Janice Marie Gleaves, thank you for your endless support, prayers, and encouragement. I acknowledge my daughter Tenecia Sherfield James for pushing, shoving, and kicking me toward completing my studies. I acknowledge my outstanding committee members, professionals of unparalleled perspective, transparency and honesty. Since the beginning of my studies, Dr. House, committee chair, has always supported and demanded the best of me. Dr. House, thank you for providing endless encouragement, the understanding of scholarly perspective and writing, and providing pragmatic cohesiveness enabling me to transform my dream into reality. Dr. Kenneth Gossett, second chair, thank you for the late night mentoring sessions. You consistently enlightened me with critical information and personal experiences and examples, which made my experience tolerable, and consequently very rewarding personally and professionally. Thank you Dr. Carolyn Solerno, URR, for your honest and transparency while assisting me with both my study topic and central research question, and being available throughout these past several years. Thank you Dr. Blando, URR, for all of yous assistance during the final leg of my journey. Finally, I would like to thank you Dr. Turner for always being a phone call or email away, always returning my calls, and offering encouragement and guidance.

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Section 1: Foundation of the Study

As recently as 2011, American church life has emphasized the corporate worship experience; trends now reflect the movement toward smaller groups (Rainer, 2012). Individuals and groups are meeting in the home and other smaller venues, but they are still enjoying enriched spiritual lives. Since the financial crisis of 2009, the economy has caused many businesses and organizations to restructure to survive, yet although many have found a pathway to sustainability, many others have been unable to remain solvent and have closed their doors or relocated. Religious organizations have been among the hardest hit with fiscal collapse, and a record number have closed in recent years. Further factors have contributed to church closures. Like many other businesses, one of the most important contributing factors is the organization's leadership and its role in business and organization closures (Sejeli & Mansor, 2015). My research indicated that when organizations fail to perform at expected and sustained levels, and after all the excuses, explanations, rationalizations, and justifications for the organization's problems, only one plausible reason emerged for organizational failures and consequent closures: poor leadership coupled with poor decision making (Sejeli & Mansor, 2015).

Background of the Problem

A record number of people have left churches, resulting in a loss of more than 2 million members every year for the last 5 years (Barna, 2009). The loss of members has negatively influenced communities because churches traditionally play a significant and supportive role in the fabric of U.S. society (Bara, 2011). These services included social services, education, and professional and civic skills training, and the loss of these services through church closures has negatively affected local communities (McMurray, Islam, Sarros, & Pirola-Merlo, 2012). The primary challenge for church leaders is meeting the spiritual needs of the community and, second, meeting the business management and fiscal requirements, as well as keeping the church and services available to the community. Based on their emphasis on social responsibility compared with their for-profit peers, it is critical for pastors and church leaders to be as effective business managers and organizational administrators as their secular for-profit peers (McMurrary et al., 2012). Church leaders, just as secular for-profit business managers and administrators, ensure meeting all organizational goals and objectives while addressing their reliance on external funding sources. In contrast to for-profit organizations, diverse funding sources such as federal, state, and local government grants, financial institutions, foundations, and philanthropic organizations sustain nonprofits in the United States (Besel, Williams, & Klak, 2011).

Problem Statement

Organizational leaders struggle to meet stakeholder needs while sustaining human, fiscal, and natural resources (Tata & Prasad, 2015). Foohey (2014) studied bankruptcy filings of 58 churches in the United States and most defaulted to the leadership of a single person, the pastor, when making financial decisions. The general business problem that I addressed in this study was that church leaders were unprepared and reluctant to manage the secular dimensions of their work during difficult and uncertain economic times (Guerrier & Bond, 2014). The specific business problem that I addressed in this study was that church leaders and finance committee members had limited strategies to ensure churches remain fiscally sustainable (Carter, Jones, & Jones, 2014).

Purpose Statement

The purpose of this exploratory qualitative multiple case study was to identify strategies that pastors or finance committee members used to maintain fiscal sustainability. Senior pastors or finance committee members, representing 10 churches that remained fiscally sustainable for at least 10 years in Akron, Ohio, participated in semistructured interviews and shared their sustainability strategies. Finally, study results identified strategies applicable to pastors and finance committee members to ensure church fiscal sustainability.

Nature of the Study

The qualitative research method is the best research method for studying aspects of social life, and it generates words rather than numbers as data for analysis (Patton, 2014). Qualitative methods address questions about the *what*, *how*, or *why* of a phenomenon (Patton et al., 2014). Quantitative methods, opposed to qualitative methods, address measurable questions in a controlled environment (Kruth, 2015). Quantitative research tests relationships, hypotheses, and examines cause-and-effect relationships in an objective environment (Kruth, 2015). A mixed-methods research design includes the collection and analysis of quantitative and qualitative data in a single study related to the research problem (Yin, 2012). The current study had no quantitative component, no surveys, and no statistical analysis; thus, quantitative and mixed methods were not appropriate.

The qualitative research designs considered included case studies, ethnography, grounded theory, and phenomenology (Kruth, 2015). This study did not indicate a single aspect, but a phenomenon from the perspective of a small group for analysis (Kruth, 2015). The case study design lent itself to synthesizing experiences from multiple participants and allowed descriptions of each participant's experience (Bradley-Levine, 2011). The results indicated theory or research applied to business, professional practices, and various other disciplines (Cooper, Nieberding, & Wanek, 2013).

An ethnographical study, contrary to this study, involves long-term and detailed study of people and their culture, and it targets a specific and delocalized phenomena (Smets, Burke, Zarzabkowski, & Spee, 2014). Ethnographic research indicates a holistic perspective for the researcher of the behaviors and interactions between group members (Weber & Cheng, 2013). The ethnographic study is a short and subjective interaction between the participants and researcher. A phenomenological researcher seeks understanding of a phenomenon from a lived experience perspective and its meaning (Englander, 2012). The business application of a phenomenological study indicates understanding the individual decision maker and decisions according to that individual's lived experiences of issues and situations (Gill, 2014). This study did not accomplish that purpose; therefore, phenomenology was not the appropriate qualitative design.

Research Question

The research question for this study was: What strategies can pastors or finance committee members use to ensure fiscal sustainability.

Interview Questions

In this study, participants answered the following interview questions providing financial planning information:

1. How does your organization receive funding?

2. What is the long-range fiscal planning process within your organization?

3. How does your organization implement its long-range fiscal planning decisions?

4. How has long-range fiscal planning affected your organization?

5. How has long-range fiscal planning benefitted your organization's ability to deal with economic downturns specifically?

6. What factors guide your budget?

7. How have you communicated sustainability within your organization?

8. Have members within the organization demonstrated their commitment to the concept of sustainability?

9. How has your organization evaluated its fiscal performance over the last 5 years?

10. Is there anything else you can tell me about what types of training you might need to make yourself a more effective leader for your church or congregation?

11. What are the strategies implemented to ensure fiscally sustainable?

12. What is the long-range fiscal planning process within your organization?

Conceptual Framework

The transformational leadership theory applied to this investigation owing to its practical application in organizational sustainability. The transformational leadership theory as the conceptual framework indicated that strengthening the relationship between leaders and organizational stakeholders might be a means to establish and maintain sustainability, specifically fiscal sustainability. Transformational leadership is capable of using soft power of inspirational vision and communications to achieve transformational goals to reform and transform the views of followers and the organizational culture to meet the leader's goals and objectives (Nye, 2014).

The transformational leadership theory was applicable to this study because the transformational model includes the dynamics of change in leadership behaviors to drive follower behaviors and implement change while improving performance (Balyer, 2012). The purpose of this study was not to measure or predict the influence of transformational leadership behaviors on employee through the multifactor leadership questionnaire (MLQ) (Piccolo et al., 2012); therefore, the MLQ was not administered. The intent was to consider the transformational leadership theory along with the components of the literature review as a concept and strategy toward sustainability.

The consequential influence may be that the study results applied within the context of a learning organization may better equip leaders to become more effective and adaptive to the constant changing nature of an organization's business environment. The study's sole purpose was to research and report findings related to the leadership strategies needed by pastors and lay persons to assist church leadership to achieve and maintain effective leadership and sustainable fiscal operations. This approach may alert church leaders to the need for a systemic resolution that may serve as the infrastructure in leadership that is adaptive and proactive in developing sustainable strategies throughout the organization. The core elements of the transformational leadership theory, coupled with the selected themes of the literature review, provided a framework by which church leaders may devise strategies' toward fiscal sustainability.

Operational Definitions

Cognitive interview: A cognitive interview is an interview method developed by cognitive psychologists for use in law enforcement interviews increasing gathered information in both quantity and quality (Condie, 2012).

Learning organization (*LO*): A learning organization is an organization creating, acquiring, disseminating, and retaining new knowledge toward establishing and modifying behaviors (Senge, Kleiner, Roberts, Ross, & Smith, 1994).

Long-range planning: The application of long-range planning provides a roadmap for understanding and coping with change within a corporation and preparing for unforeseen events that would affect the corporation (Porter, 2008).

Strategy maps: Strategy maps are plans using visual aids to organize and communicate change plans, strategy, and implementation (De Salas & Huxley, 2014).

*Sustainabilit*y: Sustainability is using a resource to diminish its depletion or damage, as well as relating to the lifestyles involving the use of sustainable methods (Emery, 2013).

Organizational defense routines (*ODR*): ODRs are patterns of behavior that keep companies from embracing big change (Euchner, 2013).

Assumptions, Limitations, and Delimitations

The three components of this section were factors with no data, unknown, or could not or would not be controlled and influenced the study (Simon, 2011). Discussed were assumptions accepted as true, or at least plausible given the population, research design, and other assumptions (Merriam, 2014). The limitations were the potential weaknesses of the study, and delimitations defined boundaries of central research question (Merriam, 2014).

Assumptions

In the context of research, assumptions were beyond my control but existed for the research to be relevant (Merriam, 2014). The fundamental assumption for the study was that participants answered truthfully and that the sample chosen represented the population referred to in the study (Simon. 2011). An additional assumption was that this study's findings would be an effective learning tool for ministers or clergymen who are leaders of nonprofit organizations. Finally, nonprofit leaders remaining successful in difficult economic times used strategic awareness, strategy, and long-range planning and stringent fiscal policies (Bowman, 2011).

Limitations

The limitations of a qualitative study are the design and method characteristics that affect or influence the interpretations of the results of the study (Merriam, 2014). Merriam also stated that limitations would affect the validity of the study based on the findings resulting from the manner in which a design or method was implemented. One possible limitation was the geographic scope of the proposed study. Even though this study included data gathered in the northeast Ohio area, the general findings of the study may not be applicable to other nonprofit organizations across the United States because of the small sample size. Another possible limitation was finding participants of organizations willing to participate in the study, which included signing a consent form and participating in a recorded interview. This limitation was important because some organizations have strict policies that govern, limit, or prohibit employees from engaging with external fact-finding activities. The final limitation for the study was the time allotted to conduct the study and finances to hire transcribers to convert interviews from digital audio files to Word text files. The study was completed in 3 weeks and I transcribed all digital files to Word text files; therefore, these limitations were removed early in the date collection process.

Delimitations

Delimitations define the boundary of a study and are in direct control of the researcher (Simon, 2011). Delimiters for this study included the conceptual framework, study objectives, research questions, and the study's target population (Simon, 2011). Research indicated many reasons why businesses fail including inappropriate business models, lack of clear and concise communication to employees and clients, limited marketing, and leadership dysfunction (Wagner, 2013). The leaders of this study were of nonprofit organizations, specifically churches, and the unique characteristic of lacking business related education and experience promoting sustainability. The scope of this study included results most applicable and useful to the sample population and the industry it serves.

Limiting the population to one specific denominational or nondenominational religious organization was not applicable for the proposed study. The central research question is not specific to any one group of nonprofit religious organization, but it was applicable to nonprofit religious organizations empirically. The study population included 10 pastors and finance committee members from both denominational and nondenominational religious organizations who demonstrated strategies that ensured their churches were fiscally sustainable. The participants selected were from several faiths including Baptist, Methodist, Church of God, Church of Christ, Church of God and Christ, Presbyterian, Lutheran, and several nondenominational faiths. The study did not include the Catholic Church, as its structure and uniqueness are vast, necessitating a more complex study and extravagant use of resources and time.

Significance of the Study

The significance of this study was important and critical, as it addressed the specific business problem facing churches and their sustainability. This study may influence the management and leadership of churches. The central research question and qualitative approach proved to be valuable and identified strategies to prepare church leaders to lead these organizations in a more effective and sustainable fashion.

Contribution to Business Practice

The value of this research was its potential to prepare better leaders to encounter the unique challenges and difficulties they may face in this industry. The research results included evidence for pastors, church leaders, and finance committee members to develop strategies for fiscal sustainability. The implementation of strategies identified in this study may be instrumental for business leaders seeking proven sustainable strategies.

Implications for Social Change

The challenges for churches from a business perspective included the need for business methods and models to support and enable them to provide essential services to communities nationwide. These organizations are under constant threat of failure because of reduced funding. The implication for social change in this study included the need for transformational leadership to drive organizational sustainability and fiscal stewardship. This point encompassed all levels of society from individuals and communities to organizations and institutions. Leaders involved in nonprofit funding, administration, and management may benefit from the findings in this study. Fiscal stewardship is essential to the concept of sustainability that any business, organization, government, or individual applies it (Rangan, Chase, & Karim, 2012).

A Review of the Professional and Academic Literature

The literature review included secondary sources such as peer-reviewed journal articles, qualitative and quantitative studies, and various websites. The sources provided the reader with a strong sense and understanding of what others in the academic field have learned about the social influences and economic concerns of nonprofit organizations. Some examples of peer-reviewed, scholarly journals included *International Journal of Business and Management*, *Journal of Leadership Studies*, *Business Information Review,* and *Journal of Applied Behavioral Science*.

Critical to this research was the review of its literature, the conceptual framework, and themes of leadership, change leadership, change management, ethics, organizational management, sustainability, transformation, and change agents. The hope was that a better understanding of each theme individually, as well as the combined themes from a transformational perspective, may increase the understanding of the interacting themes (Maxwell, 2012). This understanding may enhance organizational leaders' ability to manage an organization from a heuristic perspective (Laszlo, 2012). The combination of the themes from the literature review could enhance understanding of how a leader of a nonprofit church could improve sustainability by viewing the organization from a transformational perspective as characterized by these themes.

The data provided included areas of consideration for a nonprofit leader that are necessary for a successful and viable plan of sustainability. These areas included leadership, change leadership, change management, sustainability, ethics, transformation, and organizational management and change agents. Each summary provided a brief synopsis of the central themes of each article, secured from peer-reviewed journals and other acceptable sources. Literature describing various research designs and methods was included to provide and differentiate perspective of the research conducted for a thorough analysis of the organizational leadership structure and strategies, as they pertained to the subject matter.

All searches centered on such key words from the conceptual framework as transformation, leadership, change management, change leadership, ethics, sustainability, fiscal sustainability, and other related terms discovered during primary searches. The use of the transformational leadership approach for this study may help leaders recognize the relationship between leadership behavior within an organization and followers, as well as the influence on the organization's ability to adapt to a rapid and complex world. An organization's shift in behaviors may allow the organization to remain efficient and sustainable.

The search strategy provided two main sources of information that would eventually provide supporting documentation for the doctoral study subject matter. I used the World Wide Web and the Walden University Library as primary sources of information. The Walden University Library provided the primary and main source of information while also securing secondary sources from Internet peer-reviewed journals, articles, and various websites. The databases used include ProQuest, Business Source Complete, EBSCO, One Source, ABI/IInform Global, and other multidiscipline databases. The literature review has 68 sources with 62 sources (91.17%) peer-reviewed and published within the last 5 years. The reference list has 127 sources with 112 (88.18) peer-reviewed and published within the last 5 years.

Leadership

Leadership as a concept and as practice developed through time and was defined by the leadership development process, follower expectation, organizational culture, and event circumstances (Allio, 2013). Leadership identifies those individuals who have a vision, inspire others, act with integrity, and are authentic; a leader must ultimately deliver results (Allio, 2013). Study results and experience demonstrated that complementary, transformational, and transactional leadership styles can positively affect quality improvement and firm performance (Latham, 2014).

Leadership must be aware and capable of making decisions in the face of an ever-changing customer pool. Sustainability involves adapting to changes that directly and indirectly affect an organizations' business practices, products and services (Reeves, Haaneas, Love, & Levin, 2012). Leaders must have a holistic understanding and approach operating in business environments. Most human behavior is learned behavior and is a replication of someone else. The concepts of sustainability and regenerative leadership operate in the same manner because they are both learned behaviors. Critical to sustainable leadership is improving leadership itself (Ulrich & Smallwood, 2013). Sustainable leadership carefully allocates organizational resources adapting and changing behaviors enabling meeting the mission and objectives (Ulrich & Smallwood, 2013). The business world has changed dramatically forcing all companies to face a direct effect from decreasing natural resources, rising populations, and disruption from climate change. This change is not limited to the United States, and these are now global challenges that have already stimulated new legislation with future regulations still to come.

Similar to a builder using a blueprint to design properly and erect safe and inhabitable buildings, so too does an organization's leadership use methods, materials, processes, technologies, practices, and operations required for maintaining a healthy environment and efficient infrastructure as essential components of management. The infrastructure of a management team must be sufficient to accommodate the organizations' political, economic, social, societal, and cultural aspirations.

Research has indicated that higher productivity, lower employee turnover rates, and greater job satisfaction, well-being, and motivation are direct benefits of transactional leadership (Brandt & Liao, 2013). Evidence indicates that gender, personality, and stereotypes greatly affect both the expectation and effectiveness of transactional leadership (Brandt & Laiho, 2013). Research findings have also indicated that women are more transformational in their leadership style than men are (Brandt & Laiho, 2013). Most important is the relationship between a leader and subordinates that demonstrates a high-quality exchange and trust demonstrates a high level of leader-to-subordinate encouragement (Brandt & Laiho, 2013).

Change Leadership

Although existing literature has demonstrated that different forms of leadership influence the commitment of followers, no single form of leadership has proved to maximize commitment of followers during an organizational change (Kool & van Dierendonck, 2012). The nature and ever-changing climate of the 21st century require organizations to abandon old methods of management and to embrace the servant, transactional, and transformational methods, innovative and more suited to the current trends of managing nonprofit organizations (Grandy, 2013). Successful changes start with leadership, the fundamental driver for successful change, and understanding the importance and need to develop tools, techniques, and framework for implementing change (Allen, Smith, & Da Silva, 2013). Necessary and critical is the leader's ability to read the ebbs and flows of market and industry patterns and trends, proactively discerning when, what, how, and to what degree adjustments and realignments are necessary (Pater, 2013).

Research indicated that leaders gain followers by involving them(followers) in the change process through communication (Kool & van Dierendonck, 2012). The subsequent result enhanced organizational performance, improved individual job performance, and organizational citizenship behaviors (Kool & van Dierendonck, 2012). Other benefits included a willingness to share knowledge, as well as reduced absenteeism, chronic tardiness, and high turnover (Kool & van Dierendonck, 2012).

A demand exists for a more people-centered and ethical managerial approach in many organizations, as well as inspiration and ideas modeled after servant leadership (Kool & van Dierendonck, 2012). The servant leadership model is well suited for an organization in change because these leaders are good mentors, according to Kool & van Dierendonck (2012). The mentors are essential to the development, empowering, and inclusiveness of all employees, especially during the change process (Kool & van Dierendonck, 2012). In addition, the servant leader provides direction based on the employee's needs, ability, and input toward individual improvement and accountability, as well as stewardship through employee responsibility and service to the organization (Chan & Mak, 2014).

As an internal change agent and a member of the organization's executive transformation team, the transformational leader focuses on multiple levels during transformation (Sullivan, Rothwell, & Balasi, 2013). The transformational leader's focus encompasses the individual, group, inter-group, and enterprise-wide and extra-enterprise levels (Sullivan et al., 2013). Transformational leaders are encouraging, enthusiastic, and foster optimism to assist subordinates in performing beyond expectations (Dai, Dai, Chen, & Wu, 2013).

Transactional leaders are authoritative figures using organizational bureaucracy, policy, power, and authority to maintain control while motivating subordinates by appealing to their personal desires and economic needs (Men & Stacks, 2013). The transactional leader has a temporarily negotiated relationship with subordinates versus an enduring and purposeful one (Dai et al., 2013). As a result, transactional leadership is an exchange process which research demonstrates a negative influence of employee empowerment and job satisfaction (Men & Stacks, 2013). Transactional leaders also use contingent rewards to increase performance by guiding subordinates to achieve pre-determined goals, and attempt to increase overall organizational performance through various compensation methods (Dai et al., 2013).

Leaders often make changes focused primarily on business, financial, and technical aspects, often ignoring overall organizational change (Euchner, 2013). Regardless of organizational changes reasons, skilled senior executives must communicate and maintain compassion through the change process (Euchner, 2013). Leaders’ careful attention to employee concerns, promote trust, influencing how employees feel, think, and act regarding change (Smollan, 2013). This trust is either an antecedent or consequence of the leader/employee relationship, with employees confident in the integrity of the leaders’ words, actions, and decisions (Smollan, 2013).

Change can be overwhelming; therefore, leaders' skills keep supervisors and staff inspired, promotes collaboration and help workers embrace change. Fundamentally, change in the concept of transformational leadership is change occurring in both individuals and social systems (Jha, 2014). Change considerations should involve change beliefs, emphasis on change recipient involvement and participation, effective organizational diagnosis, creating readiness for change, managerial influence strategies, and finally an assessment of change (Ramezan et al., 2013). Consequently, positive change in followers enables these same individuals to become leaders, motivating them to take ownership and a stake in change (Ramezan et al., 2013).

Technology and innovation often are the means through which change is possible, but often just getting to the ultimate goal is a long and laborious process (Trusko, Friedman, & Varma, 2012). This approach from a technical perspective provides a long-range vision of what is to come in terms of trends, innovation, problems, and even solutions (Trusko et al, 2012). The approach allows an incremental and detailed progression of innovative ideas, concepts, and allows management the time to develop the proper tools, techniques, and framework for a successfully sustainable organization (Trusko et al., 2012).

The greatest challenge for any change process is developing an acceptable strategy for the employer, employee, and the consumer (Walker, 2012). An attainable strategy promotes balance and profitability (Walker, 2012). The best approaches introduce phases, goals, objectives, and measurements designed to bring about transformation and sustainability (Walker, 2012). The challenges facing change agents begin with a person's perception of change and their individual stakes in the change process (Walker, 2012). Clearing these hurdle positions organizational members to grasp, understand, and accept how the change will affect and benefit the organization, with them as active and valued members (Walker, 2012).

There have been extensive writings, models, and theories developed change pioneers to include Kurt Lewin's 3-phases change model (Lewin, 1958), Peter Senge's learning organizations model (Senge. 1999), and John Kotter's 8-step change model (Kotter, 2013). Each author recognized that change is evitable, and that leaders must recognize and plan for expected and unexpected change. Lewin, Senge, and Kotter contributed to understanding the phenomena of change and the development of leaders to facilitate change in their respective organizations and areas of influence. A leader's facilitation of change is the development and introduction of something new into an existing system or organization, and change is just a part of a developing transformation within that system or organization.

Change is the first phase in the process of changing behavior and unfreezing the existing situations, and minimizes barriers to change and increases the odds of a successful change effort, according to Lewin (1958). Critical to this phase is the use of change agents, particularly managers, project team members, and consultants, to bring the leadership and vision of the planned change (Lewin, 1958). During the second phase, behavioral change must take place within the people of the organization, as they indicate change acceptance, perpetuating actual movement toward change (Lewin, 1958). Finally, Lewin stated the third phase of refreezing must occur to lock in the new behaviors, requiring change agents to evaluate changes by testing, debugging, using, measuring and enhancing the new system.

Pertaining to change, an organization is a living organism with all components of the organization part of a larger system, and successful organizations learn and harness staff creativity and learning potential (Senge, Kleiner, Roberts, Ross, & Smith, 1999). Contemporary and innovative ideas and practices sustaining change, guide leaders to capture and implement ideas from groups opposed to just one individual (Senge et al., 1999). A transformative leader will seek ideas from groups, because this type of leader values and promotes inclusiveness, and this approach may minimize employee resistance to change.

The four dimensions of change are depth, origin, necessity and speed (Pardo-del-Val, Fuentes & Dobon, 2012). Change is distinguished as incremental, where only some unessential aspects of the organization change, and radical where change is strategic or revolutionary altering the essence of the organization (Pardo-del-Val et al., 2012). Based on change origins, they are reactive as a response to external stimuli, or proactive bringing change preemptively before other forces demand or require a change (Martinez-Inigo, Crego, Garcia-Dauder, & Dominguez-Bilbao, 2012).

An additional dimension of change considers if changes are fundamental for the survival of the organization, or opportunistic (Martinez-Inigo et al, 2012). Opportunistic changes are not necessary but may prove beneficial later (Martinez-Inigo et al., 2012). The final consideration is the speed or velocity of change and the different characteristics, influence, and effects of fast changes versus slow changes (Miles, 2013).

Change Management

Organizations adapt to constant changing customer demands, adjusting to technical, political, and social demands (Allen et al., 2013). Gobble (2013) stated that the circumstances dictating change management requires change leadership envisioning the future and making it happen, while also considering the dynamics of planned change, emergent change, political dynamics within change, resistance, participation, commitment, and learning (Kempster, Higgs, & Wuerz, 2014). The leaders implementing change must also understand the organization's life cycle phase (e.g., start-up, rapid growth, sustaining, decline, or turn-around) and the implications on executing change (MacCarthaigh & Roness, 2012).

A leader's management style conducive to transformation during the process of change increases creativity and innovation (Pardo-del-Val et al., 2012). In addition, a leader's style influences resistance to change and increases change results (Pardo-del-Val et al., 2012). Transformational management styles allow members outside the leadership circle, influence in the decision-making process facilitating and increasing the success of change (Pardo-del-Val et al., 2012).

Societal effects affect the organization's products and services, stakeholder relations, and training and education, necessitating strategic initiatives improving strategic strength and position (Riot & de la Burgade, 2012). Intuitive and informed nonprofit leaders address strategic and competitive challenges using various tools, methods, and practices to ensure organization survival (Sigalas, Economou, &

Georgopoulos, 2013). A leader’s cognitive ability to process information analytically, enables approaching change decisions from various perspectives increasing survivability.

The strategic map, a useful managerial tool, uncovers inefficiency in the organization, revealing hindrances to successful change (De Salas & Huxley, 2014). Strategy maps are cause and effect diagrams illustrating strategic actions enabling desired outcomes in clear and simple terms (De Salas & Huxley, 2014). Leaders applying strategy maps provide a visual representation communicating organization change strategy, allowing stakeholders a clear understanding of change goals, objectives and influence (De Salas & Huxley, 2014).

The process of change must include a change in organizational culture and necessitates change to be a part of the organization’s identity (Drzensky, Egold, & van Dick, 2012). Change as a core component of organizational identity increases organization readiness for change strength and increases the execution and consequent effectiveness of change (Drezensky et al., 2012). The process of change, therefore, increases the overall effectiveness and stability of the organization (Drezensky er al., 2012).

Ethics

Change, in an ethical context, is a set of values influencing leaders’ decisions and the consequential effects of those decisions (Burnes & By, 2012). Ethics are the beliefs governing appropriate behavioral interactions between individuals, groups, and organization members (Burnes & By, 2012). Ethics, in a leader-follower context, is a healthy and appropriate conduct demonstrated in interpersonal relationships, supported by two-way communication, reinforcement, and decision-making (Nichols & Erakovich, 2013). Identified as an essential component of authentic leadership, Nicholos and Erakovich (2013) also stated that ethics frame follower feedback.

Typically, limited interaction is experienced between followers and top leadership, resulting in follower impression being formed strictly from observation (Kottke, Pelietier, & Agars, 2013). The employees and followers' perception that the leader considers the followers perspective making decisions, perpetuates followers behavior towards change, while simultaneously enlisting them as change agents to effectuate the leader's agenda for change (Kottke et al., 2013). The followers develop trust as leaders' ethical behaviors and communication shape and sustain trust influencing a culture change conducive to organizational transformation (Tuan, 2012). Influencing ethical behavior is control through formal processes flowing from leadership to employees, and informal processes flowing from employees to leadership (Campbell & Goritz, 2014).

The advancement of trust based on ethical leadership leads to the concept of organic leadership, erasing the boundaries between leaders and employees, and allows any member of the organization to act as a leader by influencing the behaviors of other members within the organization (Tuan, 2012). Some characteristics of trustees (employee) trust are based on competence (the expectation of competent role performance of leader), benevolence (trust founded in goodwill), and integrity (the leaders belief in the employees principles) (Tuan, 2012). Burns and By (2012) suggested that ethical leadership occurs through a meaningful process of learning, based on the three interdependent dimensions of ethics (justice, critique, and care).

Ethical justice focuses on the issues and interest of social justice and human dignity, and seeks to protect the moral quality of social relations as a public and political matter (Burns & By, 2012). Ethical critique benefits one person or one group to the detriment of another person or another group to obtain a better balance in the distribution of social benefits (Langlois, Lapointe, Valois, & de Leeuw, 2014). Ethical care demonstrates an absolute respect relating to the requirement of interpersonal relationships, and not a contractual or legal commitment (Langlois et al., 2014).

The leadership and management components of businesses address many daily considerations. The fundamental structure of an organization determines its culture and general business practices. Ethics is a critical aspect reflecting both the leadership dedication and commitment to acceptable business practices. The pursuit of profit often conflicts with ethical practices, as the interest of pleasing shareholders circumvents the better judgment of some on leadership.

The demands of leadership involve the proper management of power and influence, and a commitment to self-control. Power handled with extreme prejudice, prevents leaders falling victim to its allure of complete control and haughtiness. Leaders possessed by power and overconfidence are victims of hubris. Psycho-pathological and unethical behavior, often precedes leaders losing contact with reality and overestimating their competence and capabilities.

An organization with a mechanism implemented to recognize and address the issue of hubris includes the mechanism in its leadership development program (Langlois et al., 2014). Organizational leaders are shaped and molded based on their education, experience, and the environment. Leaders routinely invest considerable resources developing and training other leaders.

Instrumental to this development is the inclusion of ethics and ethical leadership, as part of the strategic and tactical aspects of the organization's sustainability plan. Focusing on the individual and utilitarian perspectives, leadership styles and all approaches to change values ensure ethical practices (Burnes & By, 2012). A sustainable and beneficial change can only occur with the adoption and promotion of ethical clarity (Burnes & By, 2012).

Organizational Management

Organizational management views change from static versus dynamic, incremental versus revolutionary, piecemeal versus holistic, or even micro versus macro perspectives (Brown & Katz, 2011). The idea of organizational management uses change and transformational activities, improving organizational performance and achieves sustainable competitive advantages (Haffar, Al-Karaghouli, & Ghoneim, 2014). Difficulties implementing change occur as leaders ignore the role of individuals in the change process and the corresponding low level of individual readiness for change (IRFC) (Haffar et al., 2014). Leadership IRFC is critical to weathering the unplanned and unwanted storms of change, and essential for the organization's survival (Haffar et al., 2014). An effective leader may use individuals with a high level of IRFC, encouraging other and reluctant organization members to share their learning, training, and change vision (Retna & Jones, 2013).

Sustainability

Sustainability is a new concept to both individual and the business community. One drawback to the acceptance and participation in sustainability is its description in very vague and broad terms. Sustainability means different things to different entities, and each entity's perspective of sustainability meeting their needs and wants is different. The eventual development of the understanding and implications of sustainability contributes to the social change, becoming a party of every aspect of each member of society's existence. Sustainability, in the context of this study's focus, is leaders developing strategies to establish and maintain organizations as viable fiscal businesses, especially during difficult financial times.

Sustainability is all about the preservation of resources while meeting the demands of society (Coleman, 2013). The push for society to change to sustainable lifestyles and business practices is necessary as the earth's resources are in imminent danger of complete devastation (Coleman, 2013). Finally, the global community is intimately connecting, ever evolving into a world interdependent of each other to survive (Coleman, 2013).

The initial concept of sustainability was a concept of environmental and cultural preservations (Bonn & Fisher, 2011. As the concept evolved, its meaning broadened to include fiscal and support systems preservation (Bonn & Fisher, 2011). Fiscal sustainability, quantified in short and long-term timeframes, reflects management allocation responsiveness to opportunities and threats (Bowman, 2011). The organization's measurement of fiscal sustainability determines the ability to provide goods and services (Bowman, 2011). Because of the 2009 economic collapse, human capital as a valued and sustainable asset emerged as a critical commodity needing security, development and maintenance (Bonn & Fisher, 2011). While no standardized measurements and evaluations for human capital exist, business leaders agree human capital has a direct influence on organizational performance (Yeh & Kung, 2013).

All industries must contend with a global market with higher demands, competition, and responsibility. The greatest sense in corporate responsibility is the concept and practice of sustainability, particularly fiscal sustainability. Corporations must ensure that sustainability is part of the corporate strategy while also considering the social, climatic, and political effects of bringing products/services to market (Lee & Pati, 2011).

Designing and implementing a strategic sustainability plan is a conceptual and practical failure using the wrong approach (Metcalf & Benn, 2012). The "cookie cutter" approach is not the one model fits all solution for any organization (Metcalf & Benn, 2012). As the concept of sustainability gains popularity in recognition and implementation, like many business practices, the business community learns that the plan must fit the organization (Metcalf & Benn, 2012).

The process of organizational change meets sustainability protocols when carefully planned, executed, and monitored. Those organizations are taking time to carefully plan change and consider the concerns of all stakeholders, better execute and monitor their change process. Executing a phased approach permits the organization implementing needed changes in a detailed and carefully planned manner. Open and honest communications between management and employees, as well as a mechanism for feedback and grievances, fosters a sense of inclusion for all members of the organization, and the change process is easier and more acceptable to all parties (Tuan, 2012).

The organization's structure and inertia of change determine the sustaining ability in a continuously changing environment, while also executing the correct change design, and considering the dynamic environment of change itself (Tuan, 2012). Eventually, sustainability is an institutional commitment reflected throughout the entire organization's engagement activities and embedded in the governance and decision making processes (Lee & Schaltegger, 2014). The concept of sustainability is etched into the fabric of society not only through business decisions and applications, but also through the gradual transformation in how higher educational courses, degree programs, structures, operations, systems, processes and objectives, in the context of the business (Lee & Schaltegger, 2014). The world-wide business demand for education about sustainability and its business implications, recognize that sustainability is not just about energy reduction, recycling or waste minimization, but considered fundamental to long-term business strategy (Coleman, 2013).

Sustainability from a financial perspective varies in definition between for profit and nonprofit organizations, the organization’s individual business structure, revenue structure and overall goals of each organization (Sontag-Padilla, Staplefoote, & Morganti, 2012). Funding for nonprofits relies on the stability of established sources from grants, contracts, fee for services, donations and contributions from inside and outside their respective service areas (Basel et al., 2011). Nonprofit organizations struggle with the inability to plan programs beyond one year in low-income areas demonstrating the greatest need. Consequently, this inability causes an unevenness in delivering services, more worker involvement and interventions, deviating resources, and constant grant writing (Basel et al., 2011).

Transformation

A successful transformation facilitator must carefully develop, plan, and execute transformation. The organization's approach to transformation includes understanding the inertia of its foundation or organizational core, the organization's construction around its core, and dealing with the organization abilities or lack thereof (Allen et al., 2013). Leaders recognizing and understanding change content, process, and context perspectives enhance organizational transformation (Smollan, 2013). If the perception of change and its intention, depth, and implications conflict with the strategic efforts implemented, transformation endures conflict until communication addresses any misperceptions (Allen et al., 2013). Transformation is diminished and often not embraced by organizational defense routines (ODRs), those patterns of behavior preventing companies from embracing significant change (Euchner, 2013).

Leaders must understand the direct and indirect organizational effect of the latest innovations, to enable and position their transformation decision-making process. Adaptive leaders are capable of making transformational decisions designed to support the organization's strategic sustainability plan (Allen et al., 2013). Research indicated that few organizations anticipate a new set of requirements and mobilize the internal and external resources necessary for strategic sustainability plans (Johnson, Yip, & Hensman, 2012). A leader’s effectiveness essentially becomes the organization’s effectiveness at all levels and in all functions (Hargis, Watt, & Pitrowski, 2011).

The American financial collapse of 2009 and its lingering effects increased the business community conscious of their fiscal health. Nonprofits with limited donations, contributions, and funding struggled to survive. Management and leaders in nonprofits struggled adapting to funding uncertainties to survive. Uncertainties forced programs, service, and staff reduction as well as and site consolidations to meet goals and successfully positioning organizations. Well-funded and larger organizations are better able to adapt than under-funded and smaller organizations (Mosley, Maronick, & Katz, 2012). The managers of well-funded and larger organizations receive better training and preparation for fiscal challenges than managers of smaller and under-funded organizations (Mosley et al., 2012).

Regardless of an organization’s size, the global community is more connected than ever before, using natural resources, technology, innovation and services, and meeting demand, while yet sustaining those same resources for the future. The financial collapse and eventual economic collapse of 2009, hit nonprofit organizations particularly hard. These organizations relied on many different and diverse funding sources, these sources diminished during the 2009 financial collapse and economic slump (Besel et al., 2011). The core leadership in these organizations learned how to survive with fewer resources and provide the services that necessitate their very existence (Besel et al., 2011). In many cases survival necessitated consolidation and reorganization reducing services (Besel et al., 2011).

Change Agents

Change that occurs unexplained is disruptive to the workplace; as people are more accepting of explained change (Tuan, 2012). Change agents considering themselves as creators, innovators and developers, create a new world within the context of the organizational structure, operation, products, and services (Euchner, 2013). The managerial change agent approach defines and executes a systematic, continuous, and iterative practice altering specific workplace systems, behaviors, and structures for efficient and effective process (Barratt-Pugh, Bahn, & Gakere, 2013). Organizational change is an extraordinary effort, and employees are the greatest challenge pushing back on change, fighting their implementation, and even slowing and derailing change, despite the leader’s best efforts (Rothermel & LaMarsh, (2012).

Managers expect and anticipate resistance to change, and develop contingencies preventing or reducing this resistance (Rothermel & LaMarsh, 2013). Management combats difficult change in organizations with static cultures through vision, communication, and steps towards change more apt to succeed (Farkas, 2013). While the manager facilitating this role is a member of leadership, increasingly human resource (HR) managers are advantageous strategic partners within the change process (Barratt-Pugh et al., 2013). John Kotter's eight-step model applied a pragmatic paradigm for creating organizational change, emphasizing behavioral change before culture change, embedding change in the culture throughout the change process and grafting new operations and practices replacing older operations and practices (Farkas, 2013).

Change assessment indicates the aspects of change that work and those aspects not working (Farkas, 2013). This provides leadership with a clearer vision of possibilities for decision making. This assessment relies on change agents as the educators, diagnosticians, and consultants identifying and understanding organizational problems and dimensions (Du Gay & Vikkelse, 2012).

Transition

Section 1 of this study included the background, nature, and supporting literary articles relating to the central research question. During this time, Americans faced some of the worst economic times the country had seen. Many businesses and organizations continue experiencing the effects of the recession, reduced resources, and increased demands for services and products. The nature of the business sector has changed dramatically when considering electronic media, therefore, methods now need to reflect this systemic change in business.

Section 2 of the study includes the research method and its components. The areas covered in Section 2 were role of the researcher, participants, research method and design, population and sampling, ethics research, data collection, data analysis, reliability, and validity. Section 2 includes the goals of this qualitative phenomenological study, as well as the specific questions asked in the research stage. Section 3 indicated the results of the research and information useful to those reading the study.

Section 2: The Project

As recently as 2011, American church life has emphasized the corporate worship experience; trends now reflect the movement toward smaller groups (Rainer, 2012). Individuals and groups are meeting in the home and other smaller venues, but they are still enjoying enriched spiritual lives. Since the financial crisis of 2009, the economy has caused many businesses and organizations to restructure to survive, yet although many have found a pathway to sustainability, many others have been unable to remain solvent and have closed their doors or relocated. Religious organizations have been among the hardest hit with fiscal collapse, and a record number have closed in recent years. Further factors have contributed to church closures. Like many other businesses, one of the most important contributing factors is the organization’s leadership and its role in business and organization closures (Sejeli & Mansor, 2015). My research indicated that when organizations fail to perform at expected and sustained levels, and after all the excuses, explanations, rationalizations, and justifications for the organization’s problems, only one plausible reason emerged for organizational failures and consequent closures: poor leadership coupled with poor decision making (Sejeli & Mansor, 2015).

Purpose Statement

The purpose of this exploratory qualitative multicase case study was to identify strategies that pastors, church leaders, and finance committee members use to maintain fiscal sustainability. Senior pastors, church leaders, and finance committee members representing 10 churches that have remained fiscally sustainable for at least 10 years in Akron, Ohio, participated in semistructured interviews and shared their sustainability strategies. The results of the study may be helpful to identify strategies applicable to pastors and finance committee members to ensure church fiscal sustainability.

Role of the Researcher

The role of the researcher was significant, as I personally collected data for this project. The study objective was to add value to nonprofit organizations and their ability to exist long-term and sustain service to their customers. Developing strategies for fiscal sustainability will enable organizations to handle economic difficulties.

This study included data collection from interviews of pastors and other managerial church leaders in the northeast Ohio area of Akron. The views and opinions obtained from pastors and lay leaders through the interviews provided answers about the study topic and central research question. I incorporated documentation from the interviewees substantiating their claims and varied perspectives, validating the study and findings (Kruth, 2015). The interview protocol was necessary because it outlined the method and procedures for conducting the interviews for the study (Appendix E).

I gathered information through open-ended questions to make the study successful and recognized that my own experiences and subjectivity could influence the interpretations of the collected data. As a result, I relied on the variations in perspectives and experiences data, gathered from the combined interviews and any pertinent and available documentation available. This was an effort to reduce researcher bias (Kruth, 2015).

I am a church leader, specifically a pastor and an active member of the church community in northeast Ohio, with access to a vast and diverse network of many other pastors and church leaders in the religious sector. When I met other pastors and church leaders, they understood the need for information, varying techniques, and venues toward overcoming economic difficulties. It is through this common bond that I identified and secured participants from the Akron area.

Participants

Participants were from 10 churches that have remained fiscally sustainable for at least 10 years in Akron, Ohio. Qualitative study participants selected had knowledge and experience directly related to the central research question and interest in the study's findings (Englander, 2012). I used census sampling to interview the 10 participants and conducted interviews with member checking and probing questions to ensure data saturation. Dworkin (2012) identified that the sample sizes need to reflect the study segment; therefore, the sample size be an number sufficient to effectively and accurately to conduct this qualitative study. This sample size was sufficient because the purpose of the proposed study and its consequent findings was to collect new information (Dworkin, 2012). In addition, the sample size included finance committee lay leaders and pastors from churches of various denominations, sizes, and socio-economic and racial backgrounds representing churches.

I had a direct meeting with each participant and disclosed the nature and extent of the study and the interview questions. The meeting promoted trust and a sense of confidentiality for the participant (Yardley, Watts, Pearson, & Richardson, 2013). All interactions between me and participants only related to the study design, method, and conceptual framework (Irwin, 2013). All data collected were with consent for collection and archiving, as well as for the primary and sole purpose for this study in accordance to Walden University's Institutional Review Board (IRB) guidelines (Neale & Bishop, 2012).

Participants reflected and shared experiences related to effective leadership, long-range planning, and fiscal sustainability during this study. The individuals chosen possessed knowledge and experience critical to identifying and representing the different circumstances faced by churches and useful for long-term and sustainable planning and operations. Their accumulative experiences, knowledge, and input were critical to the study and findings to extrapolate unique characteristics and behaviors associated with successful long-range planning and fiscal sustainability. Study findings indicated that pastors and church leaders operating sustainable organizations possessed a business management skill set gained through education and experience. These findings included the need for all church leaders and pastors to acquire a business management skillset. The skill set increases their ability and probability to operate sustainable organizations, to reduce church closures from the lack of this skillset within church leaders and pastors.

Securing all physical documents, digital data, and flash drives in a locked filing cabinet in my office for a period of 5 years will protect participants and their confidential information. This location also houses my redundant password-protected computer. The computer operates on a dual set of secure and encrypted networks. These measures ensured all data, flash drives, confidentiality/consent to participate forms and documents were protected from unauthorized access, loss, or modification.

Data collected for this study were private, accessible solely for the purpose of review for scholarly determination and completion of doctor of business administration (DBA) program guidelines. The completed study adhered to Walden University's DBA guidelines. All participants were required to sign and received a copy of the confidentiality/consent form specifying a nondisclosure clause. Participants received copies of their answers to interview questions, with the understanding that no party may publish or share documents with any other party without written consent of interviewer and participant. All documents, forms, electronic data files and are securely stored for a period of 5 years per IRB guidelines, after which all documents, forms, and disk will be shredded and electronic files deleted.

Research Method and Design

The basis of this qualitative research was the problem of church leaders and pastors struggling in today's economic climate to operate as sustainable organizations. For this purpose, this study included detailed interviews with individuals in the selected field, providing data of event descriptions and their individual experiences (Granot, Brashear, & Motta, 2012). This qualitative study included participants' sociocultural and personal experiences and indicated an accurate and complete representation of context and meaning in participants' experiences (Granot et al., 2012).

Research Method

The research method set the foundation for the entire study. Qualitative methods of research include who and what was investigated, and they indicate the existing phenomena (Leko, 2014). The qualitative method of research was appropriate in lieu of a quantitative method because new knowledge was sought examining a specific phenomenon.

This study relied on a qualitative approach using interviews identify strategies that church leaders may use to ensure effective leadership, fiscal stewardship, and long-range planning. Qualitative research was the most appropriate for this study and the best approach for theory development and testing, the validation of constructs, and for understanding phenomena and uncovering new phenomena (Garcia & Gluesing, 2013). Qualitative research explores a particular group (church leaders) and its characteristics, contexts and dynamics within an organizational cultural system (Garcia & Gluesing, 2013).

In contrast, quantitative research was best suited for numerical based experiments, surveys, and other hypothetical and deductive approaches (Hewege & Perera, 2013). Chenail (2011) noted a quantitative design is explanatory, deductive, controlled, confirmatory, and predictive by nature. While quantitative research is rigorous, it is most appropriate for general theory testing but not versatile enough to capture the nuances and contexts of real life phenomenon (Hewege & Perera, 2013). This study did not include a quantitative element; therefore, a quantitative method was not appropriate for this study.

The mixed method approach uses simultaneous collection, analysis and interpretation of both qualitative and quantitative data (Zohrabi, 2013). Zohrabi also emphasized that mixed method increases the validity, reliability, and interpretation of data from various sources. A mixed method was not appropriate because significant or relevant quantitative data was neither vital nor necessary for this study. The qualitative method's ability of better understanding and uncovering phenomena, was the best and most appropriate method for this study.

Research Design

Chenail (2011) found that by definition, nature, and application, the qualitative design is widely accepted being subjective, inductive, exploratory, ideographic, and descriptive. The case study approach was appropriate for this study, as it allowed collaboration between the researcher and the participants, addressed the subject matter through the use of semistructured interview question and subsequent follow-up questions (Chenail, 2011). A qualitative research study is an inquiry process of understanding a social, human, or business problem, and forming a descriptive image into words (Van Winter, 2014). A qualitative research design relies on the power of the words and observations collected (Kapoulas & Mitic, 2012), diagnostically exploring the meaning of a phenomenon. The case study research design was appropriate primarily because the design facilitates the purpose of an in-depth understanding how and why of phenomena (Rittenhofer, 2015). Consequently, the case study was the most appropriate research design for achieving my objective with the proposed study.

Critical to this research design was data saturation, which was the point when the interviews provided no new insight, thus, validating the sample size was sufficient (Marshall, Cardon, Poddar, & Fontenot, 2013). I ensured reliability and validity through data collection and analysis, a rigorous and concise interview process using semistructured interviews with open-ended questions, member checking, and follow-up probing questions, needed to support a rich and descriptive interchange of information between me and the participants, constantly documenting codebook. Using the codebook I created and developed themes and subthemes until saturation. I used method triangulation, member checking, content analysis, and transcript reviews for saturation. Saturation occurred as the population and sample were from the same and only group; no opportunity existed for anything new to be gained outside of that specific group.

Limitations did not affect the validity of the study based on the findings resulting from the manner in which the design or method is utilized. O'Reilly and Parker (2012) stated that data saturation cannot be a generic requirement applied to all forms of qualitative inquiry, but is attained during data collection and analysis at the point when very little to no new information produces any change in the codebook. My utilization of both inductive and deductive coding accurately represented the concepts supporting the conceptual framework, thus the validity of the study, did not require data saturation, however, meticulous preparing, organizing, and reporting data increased datum trustworthiness (Anney, 2014).

The selected study topic is one of great interest to me. The central research question probed the phenomenon of increased church closures. I wanted to know if the closures increased, resulting not from the general financial recession of 2009, but from some unknown, specific or unique reasons. Specifically, I wanted to know if the reasons were internal or external, and if these reasons were systemic.

Population and Sampling

The population for this study was 10 people from the Akron, Ohio, area and limited to individuals in a specific church leadership sector. I used census sampling for the study. I secured a pool of 10 individuals as participants from the churches in the area. The eligibility criteria for this study were participants who are senior pastors and finance committee lay leaders with specific knowledge of organizational fiscal matters and demonstration of leading a fiscally sustainable organization for at least 10 years. I engaged other pastors and church leaders and initiated and developed professional relationships supporting my research. This approach secured contact information with others pastors and church leaders with different experiences and perspectives than my own and minimized bias. Research literature indicated that of the various and numerous sampling methods, random sampling was the preferred qualitative approach, ensuring data quality and representativeness (DeFeo, 2013). I used census sampling to interview the 10 participants from the population. This sampling method, based on proven and successful participant experience criteria, leading a fiscal sustainable organization for at least 10 years, was best for participant suitability to provide the best information and realize research objectives while addressing the central research question (Patton, 2014). The sufficient sample size for a study to collect new information is enough to reflect the segment studied (Dworkin, 2012).

Ethical Research

I secured participants for this study from personal clergy colleagues, friends of clergy members, and other contacts, which possessed the necessary and unique background, education, and experience pertinent to this study. Those individuals then personally provided their contact information via direct contact, phone, and email (Englander, 2012). Each potential participant received a consent form (see Appendix A) containing the background for this study and a confidentiality form (see Appendix B) for review (Flick, 2014). The consent form included a statement about the importance of the research to developing future church leaders as an incentive to participate (Marshall & Rossman, 2016). My IRB approval code of 10-08-15-0356182 is on the consent form.

Prefacing each interview, each participant was required to sign the consent form (Flick, 2014). The signature of the participant verified the understanding and agreement to the conditions of the study (Kruth, 2015). The reviewed, and signed agreement was required for ethical research (Flick, 2014). All participants were volunteers and received no compensation, and while no participant withdrew, participants were able to withdraw from the study at any time (Gast & Ledford, 2014). Documentation of any withdrawal would be for the protection of both the participants and me, with each party receiving a copy of the withdrawal form (see Appendix D), and signed by both parties (Gast & Ledford, 2014.

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Data Collection Instruments

I was the primary collection instrument and used semistructured interviews to collect data. I also secured data from executive reports, finance committee minutes, and leadership meeting minutes as the pastors and finance committee members made them available. Each document was a history of past subjects of discussion and the decisions made at that time. The secondary interview collection instrument was my Echo Pen, digital audio recording device used for each interview, with the research questions and the interviewee's response, and any other verbal communication between the two parties. An additional interview collection instrument was my Galaxy Smartphone for recording telephone interviews. The precautions taken ensured and met course requirements and protocol requirements for the Walden University Doctoral Program guidelines. The data collection instruments (interview, digital recording, and interview notes) served the purpose of developing a guide from census sampling identifying behavioral generalizations. The interview notes specifically were used to record key words or phrases mentioned during other interviews, and assisted member checking. Using census sampling, categorized participants according to their scores on two or more instruments (Patton, 2014). Initial contact with prospective and qualified participants was via direct telephonic contact from the potential participant and by referral from the target population.

The interviews provided the themes most common to participants as they related to leadership, transformation, fiscal sustainability, and long-range planning. The initial review and write-up produced immediately after each interview, determined a sense, definition, or meaning for each concept/theme generated. These themes were assigned a value as being present or not present, given a corresponding value (measure of unit), and assessed in the study for each participant and for the study empirically.

I created a participant list to organize and maintain data, and enhanced the data credibility for the study empirically (Yin, 2012). The participant list included (a) interview transcripts, (b) in-interview notes, (c) post-interview notes, (d) interview audio files, (e) interview narratives, (f) table of codes and themes, and (g) study findings and summation. Participants received a copy of the interview questions 2 weeks prior to interview, by email or at an arranged meeting place of participant's choosing, to increase thoughtful, accurate, and complete answers as a pre-interview process.

The initial and follow-up/sub-questions allowed participants responses to describe how they facilitate their duties directly related fiscal sustainability, long-range planning, and emerging concepts/themes. Member checking allowed participants an opportunity to elaborate on initial answers, ensuring data depth, clarity, and accuracy. The interviews, semistructured in nature, allowed the researcher to direct and ensure the focus of discussion to the central research question (Qu & Dumay, 2011).

I monitored participants' verbal and nonverbal responses during interview preventing intrusion and awkwardness during interviews (Qu & Dumay, 2011). This ensured reliability and validity of each answer and the interview as a whole, and promoted and sustained a pleasant and stress-free environment (Doody & Noonan, 2013). The resulting environment was conducive for open and honest discussion building rapport (Doody & Nooman, 2013).

Yin (2012) described a reliable case study as being conducted following a protocol including the instruments, (recruitment script, interview questions and in-interview notes), as well as the procedures and rules governing the protocol. A case study protocol (see Appendix B), also was used to record notes, and is a data collection instrument located in the appendixes (Killawi et al., 2014). Interview notes varied in length and depth for each interview, but were also included as supporting documentation with the study. NVivo was the software supporting the analysis*ook*.

Data Collection Technique

The interview method of data collection, used extensively in qualitative research, emphasizes and enables participant's reflection of their past, present, and/or future predicaments, needs, expectations, experiences, and understandings (Anyan, 2013). Participants chose the interview location that was most comfortable, secure, and private for them (Doody & Noonan, 2013). This ensured minimal inconvenience and potential breach of participants' privacy (Doody & Noonan, 2013). Most interviews were face-to-face interactions in a place of the participant's choosing; however, I did accommodate the need for telephonic interviews using my Galaxy 6 Edge cell phone, recording the interview with free software. I attempted to avoid telephonic interviews, as they are slightly impersonal when compared to face-to-face interviews, and reduce interviewer/interviewee rapport potentially reducing detailed responses and elaboration. There were a total of 4 phone interviews conducted.

The semi-structured interviews consisted of open- ended and probing questions. Subsequent probing questions revealed additional topics of interest. The interview enabled participants the opportunity to benefit from their own interview as they revisited different experiences during various stages of their professional lives (Anyan, 2013). I used a standardized transcription protocol, translating and transcribing the recorded interviews and participants' exact question responses (Merriam, 2014).

Utilizing transcript reviews, I transcribed both the initial and follow-up questions, complete with summarized as opposed to the literal answers. The defined units of analysis are individual themes representing words, sentences, and paragraphs of single ideas (Merriam, 2014). The categories and codes are from the raw data both inductively and deductively, which helped to validate and extend the conceptual framework (Merriam, 2014). Finally, I tested the coding scheme on a text sample, allowing for further code development as analysis continued and ensured code consistency with the sample (Merriam, 2014). The test used member checking for coding examination and verification for completeness and saturation. NVivo was the instrument for all source data analysis and storage for this study. Source data from documentation (financial reports, finance committee meetings, memos) was only included if that data directly related to this study's central research question, and that data relevant to and in support of interview responses and developing themes. A pilot study was not appropriate for this study, because the sample pool of participants was small.

Data Organization Technique

All data organization was through the development of coding categories, continued sorting of that data, and analysis of all data within each coding category. Data collected represented pastors and church leaders. Participants were executive level members of their respective organizations, reflecting their fiscal decision-making and strategic planning authority. I ensured confidentiality and protection of the names, titles, and organizations of each participant, assigning each participant a number code with no reference to participant's title or organization. Participant files were labeled with a letter and number representing each participant, for example, P01 represented Participant1.

All interview data were collected via digital recording with my Echo Pen and Galaxy 6 Edge Smartphone well as interview notes recorded directly to the case study protocol (See appendix B). I organized the raw data as a compilation of all participants' recorded interview files. Each file contained a file name (participant number), interview date, interview time, interview location, and a description of subject's title (Johnson, Dunlap, & Benoit, 2010).

Additional organization included the type of research collection done (field notes and recorded interview stored on CD), name of data collector, and date of data collection (Johnson, Dunlap, & Benoit, 2010). All files are password protected, and digital files along with documents will remain in a combination locked safely in the home office for 5 years. This is in accordance with IRB guidelines, for handling and storing data.

Data Analysis (Qualitative Only)

This study included the interview method of gathering data for analysis, and asked participants a specific list of open-ended questions. Johnson, Dunlap, and Benoit (2010) defined qualitative data analysis as organizing data into manageable units, discovering patterns important as relevant and shareable information. The information shared secured critical qualitative information from the participants.

While conducting the interview phase of this study it became necessary to add the leadership subthemes of mentoring, leadership training, leadership education, and leadership experience, which enhanced the data collection process and quality. My subsequent theme review determined permanency when the theme added value. Categorizing the interview data by an interview question, sub-question, and the answer identified traits necessary and possessed by the most fiscally successful pastors and church leaders.

Denzin (2012) identified the types of triangulation as a source, methods, analysis, and theory or perspective. The triangulation of sources approach relies on the consistency of findings from different data collection sources using the same method (Denzin, 2012). Method triangulation relies on the consistency of findings using different methods ensuring that any variance reflects the event traits and not that of the research method (Lin. Wu, & Tsai, 2013). Analysts and investigator triangulation uses multiple analysts/investigators to review study findings (Rao, 2013). Hoque, Covaleski, and Gooneratne (2013) described theory and perspective triangulation as the combination of multiple or diverse research methods examining the same dimension of a research problem, developing a theory from the extant situation opposed to applying the data to a particular theory.

Triangulation benefits research primarily because it increases confidence through a deeper understanding of data but is also time-consuming necessitating greater planning and organization (Denzin, 2012). This study included method triangulation, established and confirmed validity. Analysis of the research question from multiple perspectives (data sources) revealed a deeper understanding of the data collected (Patton, 2014). The method triangulation, supported by various financial reports, meeting minutes, and other available and relevant documentation reflected stakeholder's (participants) interest, knowledge, and experience in the subject matter (Bekhet & Zauszniewski, 2012).

Semistructured interviews often elicit rambling responses, and require extensive knowledge of the subject matter for proper coding (Campbell. Quincy, Osserman, & Pedersen, 2013). Coding (tagging or labeling) the interview information according to phrases, sentences, and paragraphs secured from each participant relating to each interview questions, enhances qualitative studies (Cope, 2014). I used NVivo to assist in coding for this study. As patterns emerged, the explanation of behaviors linked to fiscal and long-range sustainability supported the central research question.

Data analysis included both deductive coding (moving from general to specific) and open coding (identifying, naming, categorizing and describing phenomena found in the interview answer transcripts and in-interview notes) (Cope, 2014). Using deductive coding initially, allowed the collected data to be coding according to the interview questions. Reviewing participants' interview responses and using open coding identified themes and concepts (Cope, 2014). Finally, categorizing codes revealed their relevance to the central research question and conceptual framework.

I used Word to transcribe all interviews and an Excel documents to track interviews as they were transcribed. I also used my Echo Pen and Galaxy 6 Edge smartphone to record all interview data. A CD served as the master storage device for all recorded study raw data and associated documents. This study's data analysis included NVivo to support content and code co-occurrence analyses. NVivo queries revealed themes, as they related to the study phenomenon and central research question.

Ultimately, this tool assisted the data analysis, interpretation, and consequent evaluation creation for this study.

Reliability and Validity

Reliability

Patton (2014) described the credibility (reliability and validity) of a qualitative study as the techniques and methods used ensuring the integrity, validity, and accuracy of research findings. He also considered the researchers qualifications and experience, as well as the researcher's assumptions that support the study (Patton, 2014). Patton (2014) also described validity in the context of qualitative research as the degree study findings support the reality of the topic under study.

The use of the interview to gather data was used as a mechanism looking beyond the initial fact-finding questions, and addressed additional points of interest of the interviewer, increasing and ensuring reliability (Rossmann & Marshall, 2016). The reproducibility of this study results and its extension to a larger population was critical to the reliability of this study (Garcia & Gluesing, 2013). I ensured reliability by adhering to the chosen research design and protocol (See Appendix B), the identical and methodical process of interviewing each participant, member checking, and reflective evaluation of each interview digital audio file, transcript, and interviewer notes (Garcia & Gluesing, 2013).

Combating negative components of reliability, the cognitive interview method was applied using multiple paths of retrieval allowing more accurate information reducing errors of events and increasing reliability (Condie, 2012). Cognitive interview utilizes the mnemonic techniques of Report Everything, Context Reinstatement, Reverse Order and Change Perspective (Condie, 2012). Condie (2012) summarized that the cognitive interview achieves its objective by asking participants to recall everything regarding an event whether relevant or not (Report Everything).

According to Condi (2012), participants also close their eyes envisioning themselves in the moment of the event while detailing the event and accompanying sensory details (Context Remembered). Next, participants relate the event in reverse order starting with the conclusion going backwards systematically to the beginning (Reverse Order). The Change Perspective allows participants to relate the event from another individual's viewpoint, present as a witness to the event being described (Condi. 2012). I utilized CI to dictate follow-up/sub questions to the interviews initial open-ended and semistructured questions, enriching the quality and reliability of data collected.

Validity

Research validity is also an important aspect to any study as readers seek to extrapolate conclusions and contributions that are accurate and appropriate for implementation (Rossman & Marshall, 2016). Marshall and Rossman (2016) stated that validity exist when the instruments measures the events, behaviors, actions, or concept as intended. Likewise, according to Marshall & Rossman (2016), validity is dependent on the method and its use in the context of what is being measured, as well as the extent to which an account accurately represents the phenomena it refers to. The comparison of the digital recording from each interview to the corresponding transcript of each interview, and how well the data collected refers to the research focus ensured data credibility (Garcia and Gluesing, 2013).

I applied triangulation and scrutinized the integrity of the inferences from multiple data sources and methods, assuming the convergence of the multiple sources and methods would aggregate (Kapoulas & Mitic, 2012). The triangulation of interview recordings and transcripts, coupled with interviewer notes was a helpful and ensured comprehensiveness and encouraged a more reflexive analysis of the data. Transferability (external validity), was enhanced using several components. Census sampling provided a detailed description of the phenomenon through the participants purposely selected for their experience and understanding of the phenomenon being studied (Anney, 2014). Additionally, transferability while not measurable relies on the readers understanding of the transformation leadership theory, the study's central research question, the study's stated assumptions, and the reader's ability to view and apply these components universally to any business model or problem (Anney, 2014). I will leave it to other researchers to determine study's transferability. Finally, my interview notes and triangulation promoted confirmability (Cope, 2014), along with continued interviews ensured no new information and data saturation.

Study participants were my source of data, with each participant considered as a separate source because they each represented different perspectives and experiences. I was committed to adhere to the Walden research guidelines and maintained the study's internal coherence of these guidelines. Competent and ethical research ensured gathering, using, and storing data with integrity (Kapoulas & Mitic.

Transition and Summary

Section 2 included vital points including the research method and design, participants and population sampling, data collection and analysis techniques, as well as the study's reliability and validity. Data collected through the interviews and associated field notes supported the understanding and knowledge of fiscal and long-range planning skills necessary for sustainable organizations. The usefulness of this study reflects potential to provide crucial information for church leaders and pastors in particular, but to business leaders generally. The intent was that this qualitative study's findings would expose the importance and beneficial influence of understanding and applying fiscal and long-range planning for organizational sustainability. Section 3 included the results of this qualitative study, explored through semi-structured interviews, observations and notes, data collection and analysis, as well as, theme coding and categorization, identified strategies for fiscal sustainability

This is the end of the proposal.

Section 3: Application to Professional Practice and Implications for Change

Introduction

This exploratory qualitative multiple case study identified strategies that pastors or finance committee members can use to establish and maintain effective leadership and fiscal sustainability. The data analysis section of this study identified themes and explored the relationship between collected data and the conceptual framework. In addition, this section includes (a) a study overview, (b) the presentation of findings, (c) discussion of the applications of study conclusions to professional practice and implications of the study for social change, (d) recommendations for action and further study, (e) reflections on the research process, and (f) a summary of study conclusions.

Four themes associated with leadership emerged after data collection and analysis. The four themes identified were mentoring, leadership training, leadership education, and leadership experience. I discuss these themes later in the section, because they were identified as the themes that could be valuable ensuring effective leadership and fiscal sustainability. Although these four themes were identified to assist leaders, findings indicate that individuals took the initiative and accepted the ultimate responsibility for their own professional development. Promotions of all or some of these themes were available for employees within some organizations.

Presentation of the Findings

This analysis is based on the central research question: What strategies can pastors/leaders or finance committee members use to ensure effective leadership and fiscal sustainability? The study results indicated that effective leadership and associated behaviors were necessary and critical characteristics for anyone leading an organization effectively and toward sustainability. As a result, the relationship between effective leadership and fiscal sustainability helped formed each interview question to allow for identifying and capturing any possible patterns.

During analysis of the data collected, I identified four themes associated with the concept of leadership. The themes of mentoring, leadership training, leadership education, and leadership experience were relevant because of applicability and frequency of occurrence, and because all four align with the central research question and conceptual framework. The results are also inconsistent with the thought that only a single or specific set of skills, knowledge, or expertise will ensure effective leadership and fiscal sustainability. The results indicated that the combination of mentoring, leadership training, leadership education, and leadership experience ensured effective leadership and fiscal sustainability, but they could not guarantee effective leadership and fiscal sustainability, primarily because of the dynamic nature of world market relationships and the unpredictable global economy. Whereas my research indicated mentoring, leadership training, leadership education, and leadership experience as themes as possible strategies, there are endless possibilities and combination of ideals, concepts, and practices contributing to effective leadership and sustainability.

Mentoring

Study participants referenced mentoring as a critical component of leadership and sustainability and used mentoring as a tool to share information, expertise, and skills, while allowing followers active participating in decision-making. Research indicated that organizations, in particular nonprofit organizations, use mentoring to address increasing employee retention and improve productivity, and they use mentoring to establish sustainability within the ranks of leadership. More specifically, mentoring may used specifically for career development, knowledge transfer, leadership development, and diversity, with an inclusive environment where cultural, age, gender, and other differences between people allowed both parties to better understand and appreciate the other's perspective or sensitivities.

P01 stated, "Effective leadership is seeing the big picture, making the tough decisions, setting the example, and demonstrating the ability to do whatever is necessary for progression, while including the employees in a mentoring process." Although the statement is an accurate representation of leadership and mentoring, it is more specifically an example of transformative leaders recognizing the relationship between leadership behavior within an organization and followers and the effect on the organization's ability to adapt to the rapid and complex world. P01, P07, and P09 indicated that transformative leaders as mentors can play a significant role in the development of employees, especially leaders, P06 stated, "Yes, I guess that it is true that transformative leaders understand and accept that they don't know everything, and that both parties do benefit from mentoring, and mentoring transfers skills, knowledge and the normal practices from the transformative leader as a mentor."

When questioned whether job-shadowing in combination with mentoring could be a means of preparing individuals for new positions and responsibilities, P06 stated, "Yes, I believe that would work, yes, I support that statement." Embedding sustainability into peer mentoring courses is also a viable and pedagogical approach toward effective leadership and sustainability in the context of change (Sherman & Burns, 2016). Differing from a traditional top-down mentoring approach, a leader to follower interaction, peer mentoring is a lateral interaction approach, and research has indicated that the combination of both approaches increases the understanding of sustainability from a multidimensional and critical thinking perspective (Sherman & Burns, 2016).

P01 commented, “I realized that my employees really respond to me, because I am willing to do the things that I have asked them to do.” This experience indicated that leaders, who are transformational in leadership style, expect people to follow them because of the inspirational and relational nature of the leader/follower connection (Mathew& Gupta, 2015). This behavior causes a shift in organizational behavior and allows the organization to remain vital, efficient, and sustainable.

P01, P05, and P09 confirmed that leadership must be first above all things, especially for setting examples of behaviors to follow. P05 added, “Communication is critical in mentoring, because it promotes the consideration of organizational, political, economic and social issues pertaining to any organization and even our society” My conclusion is that mentoring and the examples mentioned included the idealized influence attribute of the transformative theory. These participants were leaders of high moral standards and expectations, and communicated a clear and precise vision with follower inclusiveness. Mentoring reflected a means of demonstrating individual consideration, attending to each follower’s needs by listening and addressing those issues valued by the followers. Finally, mentoring included all components of the literature review, confirming and understanding the role of effective leadership, while introducing and navigating change and promoting the concept of sustainability.

Leadership Training

The challenge of any leadership training program or business school in the context of change and sustainability, is ensuring students attain the skills necessary to function as an executive officer or executive support staff in today's global and fluid marketplace (Dyllick, 2015). The measurement of success of a leadership training program or business school, is reflected in how well leaders are equipped for real situations and challenges, where empowerment leads them to develop new behaviors from new perspectives, insights, and knowledge (Peterlin, 2016). Also according to Peterlin (2016), an organization's leadership training/development plan should be aligned with the core principles of the organization, empower followers, include the concerns of both internal and external stakeholders, and provide followers with the most recent and desirable skills (Peterlin, 2016).

The transformative leadership theory is based on the value of sustainability and authentic leadership (Peterlin, 2016), and could be instrumental through the usage of followers in organizational culture change and transformation, with an integrated approach utilizing teaching, learning, research, sharing and operations (Warwick, 2016). This approach would utilize the followers themselves as internal catalysts for change, with an focus on sustainability in every aspect of the organization, and is most effective with both top-down and down-up support (Warwick, 2016). Organizations including sustainability in leadership development plans, utilize transformative leaders demonstrating authenticity in their care and dedication to individuals, organizations, as well as social concerns, to train leaders/followers in the context of sustainability (Peterlin, 2016).

P06 shared that, “Training for me is an ongoing process, and regardless of my education and experience, I as a leader must also seek additional training to broaden my knowledge to stay relevant.” P06 continued to say, “I also personally gained my additional leadership and sustainability training through workshops, seminars, conventions, and various other ventures and programs” P08 stated, “You know what, as I think about this, the best training is really practical experience from working in a field or industry, and being exposed to as many differing aspects of an organization as possible.”

When questioned about leadership training, P07 responded, “My experience has been that leadership training allows for the cultivation of what is in an individual, and the opportunity for that individual to contribute their total skillset and knowledge to their organization or company.” P07 continued to say, “Transformative leaders including the supervisors, managers, and even the president of an organization, should promote an learning environment and culture for potential and positioned leaders to learn, maintain, and promote principles of that organization.” P07 agreed that often during training, chaos erupts within the organization, presenting the opportunity for practical and sometimes unusual solutions to resolve issues and return to normalcy.

The result is a leader transformed into an effective leader and powerful internal change agent, understanding sustainability and the importance of relationships in a collective effort and continuity of purpose. P07, P03 and P02 agreed that leadership training further advances the sustainability plan for an organization, as these leaders learn to train and position others demonstrating leadership potential, securing and ensuring an efficient and constant supply of transformative individuals within the organization. Finally, according to participants' response, all agreed that organizations should constantly evaluate and revise as needed, their leadership training programs; this allows for the immediate and accurate transfer of new ideas, practices, and skills back into the leadership-training program and promotes sustainability.

Study results indicated the importance of leadership training in the development of careers and experiences of the study participants. Participants also agreed that any viable organization dedicated to sustainability should have a leadership-training program, or provide some external training. Leadership training, therefore, included the intellectual stimulation attribute of the transformative leadership theory, as it allows leaders to be challenged, promoted out-of-the-box creative and innovative thinking, stimulated new ideas, practices, and behaviors. It also aligned with and confirmed the literature review, as all components are concepts could be included in leadership training program.

Leadership Education

Research indicated that historically, business schools have not incorporated sustainability into their curriculum (McGee & Grant, 2016). However, those business schools utilizing sustainability as a core curriculum have provided knowledge, as well as opportunities for self-examination of personal convictions, which may then alter their individual behavior as well as business approach (McGhee & Grant, 2016). Research results also indicated that business leadership courses exposed students to normal business operations, challenged them to identify, introduce, execute, and manage change, and students drew their own conclusions of the implications of the change for both themselves and for the organization (McGee & Grant, 2016).

While sustainability has been widely implemented in global business practices in recent years, it is imperative that future business leaders gain the skills required to manage the ever-evolving and ever-changing demands of sustainability (Barker, Wilson, Venkatachalam, Cleaves, & Garnham, 2014). It is to this end that business-focused higher educational institutions are critical to the development and preparedness of business leaders (Barker et al., 2014). Therefore, while currently few business schools incorporate sustainability as a core element of their curriculum, more are beginning to add courses to better prepare students, who will become or are currently leaders where they are employed or where they will eventually be employed (Barker et al., 2014).

Study results support this assertion; for example, P09 shared that he found that it was critical to gain additional training, education, and even certification throughout the years, to ensure his ability to perform as a chief executive officer. Education is one component of leaders' accumulated resources, according to Metcalf and Benn (2015), enabling development of a learning environment and culture within an organization. Transformative leaders enriched employee understanding of environment, shared appropriate strategies for problem solving, and motivated follower approach and commitment to individual duties and the organization as a whole (Allen et al., 2013). P06 also shared that while some people have charisma and are natural-born leaders, they may benefit from formal training and education, increasing their overall knowledge and understanding of business, leadership, and sustainability practices. Leadership education is a means of sharing information and knowledge, and helps individuals realize what they had to offer as a contribution to effective leadership and sustainability, according to P06. P04 also shared that leadership education provides the fundamentals, but also should empower leaders to learn and ultimately educate others through proven methods and practices.

Leadership Experience

Fundamental to the transformational leadership theory, is an individual or mentor's ability to understand how an individual's knowledge and past experiences can be transformative in the context of change and sustainability (Chaimongkonrojna & Steane, 2015). Transformative leadership enabled participants to predict or read complex problems and their accompanying dynamics, and having past success in finding solutions through their adaptability, enhanced the development of leaders and followers in the context of sustainability and change (Metcalf & Benn, 2013). Participants were constantly challenged, and as experienced leaders were aware and able to adapt to rapid changes in the marketplace and stakeholder demands, while including followers/leaders to mold and shape them (Metcalf, Benn, 2013).

A transformative leader's cumulative traits, behaviors, skills, competency, education and training, interaction patterns, and role relationships, define a leader's total experience. "I believe that the total sum of mentoring, education, training, experience and relationships, best developed and prepared me as a leader," stated P05. Later in his comments, P05 stated, "As I think about it, transformative leaders are always in a state of transformation, because they understand the necessity and benefits of sustainability and promote the ideals and concepts associated and supportive of sustainability."

According to P04, a leaders lifetime experiences allows them to develop patterns of behaviors, and are fundamentally interwoven into the leader's mindset and skillset. Consequently, Participant 4 believed that a transformative leader can share experiences, communicating an understandable, powerful and engaging vision. Demonstrating a willingness to invest themselves as a leader in a collective effort to support organizational goals, followers may then also be willing to invest themselves, as the leader has successfully shared a vision that is encouraging, optimistic, and promotes a follower's reliance and belief in their own abilities. Leadership experience, as shared by study participants, strongly supports the inspirational motivation attribute of the transformative leadership theory. This exchange of knowledge, and the sharing of past experiences with the articulation the current organizational vision, can promote a strong sense of purpose, energy and motivation among followers.

The study findings indicate the transformative leadership theory and central research question, establishing leadership as the foundation, and the individual themes as one strategic approach to effective leadership and fiscal sustainability. Mentoring was identified by participants, both as a mentor and mentee, as a means for transferring knowledge, expertise, and specific leadership behaviors unique to industry, while providing an avenue for feedback, transparency, honesty, and commitment to organizational goals, objectives, and mission. According to study findings, mentoring was formal and informal, leader–to-follower, and peer-to-peer, and appeared to be always present in some form or fashion. Mentoring, therefore, was a strategy transferrable throughout organizations, applicable in all situations, and firmly reinforced effective leadership and fiscal sustainability.

Participants agreed that a formal approach to leadership training was beneficial; and while not available in all organization, other avenues such workshops, seminars, electronic media, and varies learning institutions, provide opportunities specifically designed for leadership training. Findings also indicated that leadership training should be industry and need specific in order for the full benefits to be recognized. For example, junior leadership and senior leadership had commonalities in training, but each group also had unique for them. The same is true when comparing a large organization with a smaller organization, commonalities in training will exist, but leadership training for both groups has particular and unique needs not really applicable to the other. Findings indicated leadership training was not a cost for an organization, but an investment in the organization. Participant responses acknowledge that the most effective and successful leaders, recognized and invested in leadership training as a means of sustainability for the organization, but particular a means of sustaining leadership itself. Study results indicated leadership education as valuable and desirable resource supporting effective leadership and sustainability, but only a few study participants actually had any formal leadership education.

Likewise, findings included leadership experience regardless of length, industry, or transferability, nonetheless valuable and especially applicable when the leader viewed their experience in the context of effective leadership, sustainability, and the needs of the organization. Findings also reflected that leadership experience was unique to individuals, and the accumulative experience provided rich perspectives.

Finally, the transformational leadership theory as the conceptual framework, and the four themes of mentoring, leadership training, leadership education, and leadership experience demonstrated that effective leadership and sustainability was attained through the development and strengthening of relationships between leaders and organizational stakeholders. This fact was repeatedly reinforced as study participants shared experiences and examples in their respective careers, reflecting the four themes as well as the topics of the literature review. Referencing the literature review, leadership, change leadership, change management, organizational management, and ethics are centered on the responsibilities and duties of leadership itself, providing vision, strategic planning, recognizing and preparing for change, and demonstrating behaviors appropriate for navigating an organization through the change process. Also to that end, understanding and navigating transformation, using internal and external change agents, establishes and reinforces the concepts of effective leadership and sustainability, and their consequential and beneficial effect on the organization, its vision and mission.

A sample APA-compliant table is included below (see Table 1). Instructions for creating tables and adding table numbers and titles are included in the accompanying Instructions document available on the Templates page of the Doctoral Capstone Form and Style site.

Applications to Professional Practice

The findings of this study supports the application of the transformational leadership theory into practice, as it can assist to better position and prepare individuals and organizations, to experience and/or facilitate positive changes to establish and maintain effective leadership and sustainability. The implementation of effective leadership and fiscal sustainability strategies identified in this study, might help nonprofit leaders, especially pastors, church leaders, and finance committee members, develop and maintain an effective and sustainable organization. Although the purpose of this study was to identify strategies that may assist leaders to promote effective leadership and fiscal sustainability, nonprofit leaders, especially pastors and finance committee members, should understand that customization of ideals, concepts and practices unique to each organization's specifics needs, industry and vision, determine what concepts to select and implement into practice, proving meaningful and applicable to everyday business practice.

The strategies identified in the study, mentoring, leadership training, leadership education, and leadership experience are unique for this group of participants, based on their individual and combined experiences. A different group of participants may produce similar or exact results, but could also be very different, yet still a viable and effective strategy. Consequently, the possibilities are immeasurable, yet critical to developing a strategic plan for effective leadership and fiscal sustainability, or whatever the focus of research may be. Study results indicate mentoring in some form or fashion can co-exist in the dedicated environments of leadership training, leadership education, and leadership experience; therefore, I had an extended discussion about mentoring.

Leaders of organizations can use mentoring as an individual-to-individual approach, specifically design to introduce, train, and develop individuals in a manner that is consistent with organization vision, current business practices, effective leadership and sustainability. Mentoring should be a protected relationship benefitting the organization, mentor, and mentee, while also securing the needs and concerns of internal and external stakeholders, and a means of understanding change in the context of sustainability (Templeton & Tremont, 2014). Mentoring is a strategic and valuable tool supporting personal development, according to Templeton and Tremont (2014), a shared relationship, building trust, respect and transparency and allowing feedback for areas of improvement.

In practice, mentoring should be viewed as a fundamental business investment that prepares individuals by providing a learning environment and increased morale, needed for proper development and alignment of organizational needs (Templeton & Tremont, 2014). This will assist organizational leaders as the advance their business operations through new technologies, as well as new and innovative concepts and ideas, empowering an understanding of necessary strategies leading to effective leadership and sustainability.

Leadership training benefits the organization as well as the individual. Training in general, is a constant dynamic in any organization because some degree of change in process, work/information flow, products, services and/or systems is always occurring.

However, targeted training for specific individuals or groups, allows dedicated presentations designed solely for the audience present. The implication being that training must serve a strategic purpose and be a component of a larger training strategy for the entire organization. However, leadership training ensures the effective leadership and sustainability guiding the organization.

Leadership education has not kept up with changes in the marketplace, especially in institutions of higher education, and has allowed for the advancement of private and for profit institutions of learning dedicated to the market segment. Evidence from my research, indicated traditional learning institutions answering the market demand and now offering courses and specialized degrees in both leadership and sustainability disciplines. As a result, some senior leaders and executives are going back to school, to ensure the latest in ideas and information are available to help them better serve their customers, but to also assist selecting potential leaders with the latest in market trends, specialized leadership and management training and associated certifications.

Leadership experience is unique as a matter of each individual's perspective. An individual's leadership experience develops over time through trial and error, success and failures, but more importantly, through relationships and the dynamics of those relationships from a business perspective. The implication from a business and customer perspective is that leaders must know their business, serve, anticipate, and please their customers. This promotes brand loyalty, as well as profitability and sustainability.

Implications for Social Change

The results of this study supported the central research question, but I specifically found the semi-structured interviews the most informative and thought provoking aspect of the study. The participants' responses to questions, personal accounts and examples of professional experiences, and uninhabited space for discovery and explanation, provided a rich environment for me to learn and better understand each participant. The strategies discussed in this study, directly involved study participants and the culmination of their combined experiences, proving strategy development and implementation necessary. Additionally, developing, implementing, and adapting strategies according to specific needs, may contribute to effective leadership and fiscal sustainability. The most critical factor of managing any change or strategy is total support from leadership as well as follower involvement and buy-in.

The strategies outlined in this study have been successful for the participants of this study, and may assist future nonprofit leaders, especially pastors, church members, and finance committee members, in their efforts to attain effective leadership and fiscal sustainability. The results of this study may also increase the awareness of nonprofit leaders regarding change and sustainability, and provide strategies for successfully managing both practices. Shifting paradigm is not a controllable dynamic, but can be beneficial to those recognizing and applying the principles and premises.

As it pertains to this study, target audience, and concept of transformational leadership theory, there is an undeniable natural and progressiveness surrounding effective leadership and sustainability. The experience of effective leadership and sustainability is a positive one, benefitting individuals, communities, organizations, institutions, governments, and cultures, ensuring relevance, viability, and survival. The results of the practical application of the transformational leadership theory are tangible improvements to individuals, communities, organizations, institutions, cultures, or societies, as the finding could affect social change/behavior.

Recommendations for Action

Leaders of nonprofit organizations seeking strategies for effective leadership and fiscal sustainability may consider the strategies outlined in this study. Senior leadership must first devise a strategic plan that includes the consideration of the topics listed in the literature review. The consideration of leadership, change leadership, change management, transformation, change agents, ethics, and organizational management will assist in determining what needs to happen, when it needs to happens, and who will execute the effort. This will also inevitably determine what strategies are most appropriate for any given organization based on mission, vision, products, and services.

The implementation of any change in an organization starts with proper preparation (selecting strategies, concepts, ideas and innovative perspectives), communication (open, honest, clear vision), and follower buy-in (allowing and empowering follower support, participation, and ownership). If leadership supports the plan, followers are included in discussions and decisions, the change process progresses, and then proper implementation will benefit the organization as well as organization members. Critical to this effort is the awareness that change is inevitable and necessary if the organization is to survive and prosper; which is in every stakeholders best interest and supports the conceptual framework, central research question and applicable to sound and sustainable business practices.

Informing leadership and senior management of political, social-economic, political, cultural, environment, and legal trends affecting the organization and its interest is critical. Additionally, a well-informed stakeholder will also benefit knowing at any given time, the state of the organization and viability. My desire is to share study results with other nonprofit leaders, especially pastors, church leaders, and finance committee members, as a means of assisting them to improve and advance business operations with new strategies and an understanding how strategies, effective leadership, and fiscal sustainability jointly undergird efforts to strengthen and promote the organization

Recommendations for Further Research

During my research, I have found no evidence of any research evaluating the themes of mentoring, leadership training, leadership education, and leadership experience from a cost/benefit perspective, assigning a monetary value tracked, collected, analyzed, and reported to management. The findings and recommendations from this study may be useful to a nonprofit organization seeking improved performance through effective leadership and fiscal sustainability. Management's adoption of effective leadership and fiscal sustainability strategies could provide proven methods to enhance organizational performance and sustainability. This information could potentially assist management determine which strategies are most effective overall, or while effective in sum, is not cost effective.

The geographic scope of this study was based in northeast Ohio; therefore, the census sampling research conducted means that the general findings may not be applicable to other nonprofit organizations across the United States. The strategies identified were selected based on a single group of participant experiences, backgrounds, and years of successful leadership through change. The experiences, backgrounds, industry in another geographic region may be completely different and not applicable to the specific strategies of this study; although the process would still be valid and reliable to produce strategies better suited for the needs of another geographic region and group of participants.

The findings of this study warranted additional exploration of strategies specifically for effective leadership and fiscal sustainability. Strategies will vary based on organizational needs, industry, and unique experiences of organization leaders. Junior leadership and senior leaders strategies will vary based on previously mentioned factors, and strategies determined and selected based on available capital, time, technology, organization needs, as well as opportunities available. Additional exploration involving followers could enhance strategy discovery for development and implementation, introducing and integrating the results throughout the organization as appropriate. The greatest gain for the organization and its members is a proven mechanism of change, dedicated to effectiveness and sustainability.

Finally, exploration of estate planning and planned giving could assist the church and members to meet obligations, and both could be strategies toward fiscal sustainability. Historically, religious organizations have used short-term financial fund raisers, dinners, and other various events to finance operations. Today, especially with the technology and innovations in the marketplace, religious organizations need to be active in social media and other electronic venues to take available of all possible opportunities

Reflections

I began my doctoral degree journey, not really knowing what to expect, and how my past educational and professional accomplishments would assist, hinder, or be of no consequence to the task ahead of me. While I had project management as a part of my training and work experience, I was overwhelmed by the sheer volume and level of detail required for this project. The greatest challenge during research and presentation of findings, was the adherence to course requirements, and alignment of the central research question, conceptual framework, purpose statement. The semi-structured interviews were each a unique and full-bodied representation of the struggles, success and failures of others, and their willingness to share them with me was greatly appreciated. Likewise, the university offers an inexhaustible treasure chest of tools, resources and assistance that were needed and greatly appreciated.

Having experience with traditional, online, and blended formats, I think my doctoral experience has better prepared me for future challenges and success, as it has allowed to me to reassess my worldview, as well as morals, values, and ethics. The greatest contribution to my success, outside of my own efforts, where those of faculty, support, and service personnel. Additionally, my committee was not only concerned with me finishing my studies, but they also ensured that I secured a sound understanding and dedicated to scholarly writing, which is valuable for self-expression, but also but also the ability to express in writing complex and complicated ideas and concepts in a professional manner. Finally, my experience with study participants allowed me to understand, appreciate, and value different perspective, experiences, and industries, from a leadership perspective meeting the demands of change and sustainability. I was also surprised that participants were eager and forthcoming in sharing their successful strategies and ideas, and leaving the door open for further assistance.

Conclusion

Conducting this exploratory qualitative study, I discovered more things about myself, than the subjects of the study itself. The transformation leadership theory works well for me because of my leadership style, experiences and education. For example, as a pastor, I am a servant first who is a dedicated decision maker always investing in self-development.

My goal as an organizational leader is to invest in leadership teams to shape a work culture that will empirically invest in the development and inclusion of all personnel, the overall organization, and industry, who will further invest in their communities, organizations, cultures, governments and society as a whole. So, from my perspective, if there is not a commitment to development and sustainability, there is no investment in the future of the organization or its members. If, however, through informed decision making, proper communication, planning and execution of a strategic plan, each member as a stakeholder, is important and a valuable resource within the organization and to themselves.

I learned that leadership is matter of perspective, so while a title may signify a particular individual as a member of leadership, how an individual views and values themselves, is the true definition of a leader. Make a difference in the world by contributing all that you are and have, to the betterment of society in your individual realm of influence.

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Appendix A: Case Study Protocol

A. Case Study Introduction

1. Research Question - What strategies can pastors or finance committee members use to ensure fiscal sustainability?

2. Research questions.

    1. What are the strategies implemented to ensure fiscally sustainable?

    2. What is the long-range fiscal planning process within your organization?

    3. What factors guide your budget?

3. Conceptual Framework - The transformational leadership theory applies to this investigation due its practical application in organizational sustainability. The transformational leadership theory as the conceptual framework may demonstrate that strengthening the relationship between leaders and organizational stakeholders may be a means to establish and maintain sustainability, specifically fiscal sustainability. Transformational leadership is capable of using soft power of inspirational vision and communications to achieve transformational goals to reform and transform the views of followers, and ultimately the organizational culture to meet the leader's goals and objectives.

B. Protocol Purpose and Intended Use

1. Protocol to be used by the researcher to guide and inform all study data collection, analysis, and findings and conclusions preparation efforts.

2. Researcher will use the protocol to ensure dependability of case study methods, findings, and conclusions

C. Data Collection Procedures

1. Data to be collected from conducting interviews and the review of recorded interview and interviewer's notes.
2. Researcher will recruit interviewees from industry contacts and contact referrals.
3. Pre-interview contact via telephone.
4. All preparation takes place prior to interview.
5. Data collection tools: Digital audio recordings, researcher field notes, and case study database.

D. Outline of Case Study Report Contents

1. Overview of study
2. Presentation of the findings
3. Applications to professional practice
4. Implications for social change
5. Recommendations for action
6. Recommendations for further study
7. Reflections
8. Summary and study conclusions

E. Case Study Interview Questions

1. What are the strategies implemented to ensure fiscally sustainable?

2. What is the long-range fiscal planning process within your organization?

3. What factors guide your budget?

F. Data Analysis Techniques and Tools

1. Coding (deductive and open)
2. Analysis tools
a. NVivo
b. Microsoft Excel
c. Microsoft Word

G. Study Dependability, Credibility, and Transferability Methods

1. Dependability methods
a. Case study protocol use
b. Case study database creation

2. Credibility and transferability methods
a. Multiple data sources (credibility)
b. Assessment of rival explanations and research bias identification (credibility)
c. Rich description of study sample population.designation.