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# Strategies for Retaining Employees in the Nonprofit Sector

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# Walden University

College of Management and Technology

This is to certify that the doctoral study by

George Parker

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## Review Committee

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

Dr. Dina Samora, Committee Member, Doctor of Business Administration Faculty

Dr. Scott Burrus, University Reviewer, Doctor of Business Administration Faculty

Chief Academic Officer  
Eric Riedel, Ph.D.

Walden University  
2018

Abstract

Strategies for Retaining Employees in the Nonprofit Sector

by

George Parker

MBA, Excelsior, 2015

BS, Park University, 2010

Consulting Capstone Study Submitted in Partial Fulfillment

of the Requirements for the Degree of

Doctor of Business Administration

Walden University

February 2018

## Abstract

Voluntary employee turnover is a concern for nonprofit leaders due to human capital's strategic role in achieving performance excellence. The consequences of volunteer turnover include loss of profitability, productivity, knowledge, and financial stability. The purpose of this single-case study was to explore strategies used by 3 leaders of a nonprofit organization in the Washington, DC, area who have experience with the nonprofit's employee retention efforts. Data were collected from semistructured face-to-face interviews and organizational documentation and analyzed through the conceptual lens of Maslow's hierarchy of needs theory. Data gathered from interviews and analyses of organizational data and performance outcomes were manually coded and thematically organized. The use of member checking the data and methodological triangulation increased the trustworthiness of data interpretation and the study. Three key themes emerged: (a) training and development, (b) advancement opportunities, and (c) strategic leadership. Through analysis of data collected for this study, nonprofit leaders can assess their employees' development needs and provide training to support their growth. Nonprofit leaders may support their employees' development by creating a career path by aligning tenure with advancement and formal training. Nonprofit leaders' actions and decisions affect workforce commitment. Nonprofit employees are intrinsically motivated to create positive social change and make an impact on nonprofits' stakeholders via programs and services. Nonprofit leaders can use this study to improve retention strategies, ensure their employees' wellbeing, and contribute to positive social change by assisting employees in ensuring stakeholder wellbeing.

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## Dedication

I dedicate this doctoral study to my mom, a working single parent who I owe for all of my accomplishments in life. I am thankful for your love, care, and values. I will always strive to be the man you raised me to be. I promise! I love you! Aikido, this is for you also. Always believe in your ability to achieve the unbelievable. I love you! Ieshia, Monte, Jamaar, and Jayden, I love you!

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## Section 1: Foundation of the Study

Voluntary employee turnover is a significant problem that nonprofit leaders must overcome (Word & Park, 2015). High levels of voluntary employee turnover pose a threat to productivity and profitability and organizational leaders' efforts to fulfill the organization's mission. Nonprofit leaders must satisfy employee needs and expectations to improve employee retention rates. According to Selden and Sowa (2015), nonprofit leaders must focus on various factors such as leadership development, compensation, and employee relations to reduce employee turnover and ensure employee organizational commitment. Nonprofit leaders should apply focus on retention strategies and hold reduction of turnover as a critical aspect to improve organizational performance (Word & Carpenter, 2013). However, some nonprofit leaders lack retention strategies to meet organizational needs (Renz, 2016). In this section, I will describe the background of the problem, the problem statement, the purpose statement, nature of the study, research questions, and the conceptual framework I used as a lens to assess the business research question. I provide a review of scholarly literature on employee turnover, retention strategies, and the nonprofit sector.

### **Background of the Problem**

Voluntary employee turnover is a significant business issue and challenge for organizational leaders across various professions and industries. Researchers (Flickinger, Allscher, Fiedler, 2016; Peltokorpi, Allen, & Froese, 2014; Spell, Eby, & Vandenberg, 2014;) have analyzed how particular factors such as organizational leadership, compensation, job characteristics, and organizational culture can affect employee

retention rates. High voluntary turnover correlates with adverse performance, low morale, and loss of knowledge for groups, work units, and organizational operations overall (Hausknecht & Holwerda, 2013). Organizations cannot thrive without the commitment of employees to achieve an organizational mission and vision. Therefore, organizational leaders cannot neglect the importance of implementing effective retention strategies. Employee turnover is costly; organizations lose revenue, essential employees, and sustainability during times of high voluntary turnover (Yongbeom, 2013; Park & Shaw, 2013).

Additionally, the cost of hiring and training new employees is more expensive than retaining employees (Kim, 2014). The leaders of nonprofit organizations with limited resource budgets face a significant task to juggle the financial sustainability of their organization and mitigate the consequences of employee turnover (Selden & Sowa, 2015). Nonprofit leaders must develop effective retention strategies to meet the complex challenge to appeal to different employees with various needs. Further research on retention strategies may provide nonprofit leaders with contemporary strategies that they can use to retain employees. Nonprofit leaders face a unique and multifaceted employee retention problem that requires effective retention strategies to mitigate employees' intentions to leave.

### **Problem Statement**

The long-term success and survival of any organization depend on the work and retention of a committed workforce (Das & Baruah, 2013). The costs associated with employee turnover, such as recruiting, selecting, and retaining successors for departed

workforce members exceed 100% of the annual compensation of vacant positions (Bryant & Allen, 2013). The general business problem is some business leaders lack strategies for retaining their workforce. The specific business problem is that some leaders of nonprofit organizations lack strategies to retain their workforce.

### **Purpose Statement**

The purpose of this qualitative single-case study was to explore strategies leaders of nonprofit organizations use to retain their workforce. The target population comprised three leaders of a nonprofit organization with a national presence that is in the Washington, DC, area. The implication for positive social change includes the potential to improve hiring and retention strategies to achieve a workforce with capability and capacity to fulfill nonprofits' social missions and to help communities served by nonprofit organizations in the United States.

### **Nature of the Study**

The chosen research method and design for this study was a qualitative single-case study. Researchers use the qualitative method to explore a phenomenon through an open and inquiring stance that enhances the understanding of the perspective of individuals involved (Lyons & Bike, 2013). The qualitative method was appropriate for this study because I explored the phenomenon of employee retention in nonprofit organizations. Researchers use the quantitative method to develop hypotheses and theories (Hoare & Hoe, 2013). The quantitative research method was not appropriate for this study because I did not seek to test hypotheses, test theories, or conduct statistical analysis. Researchers use the mixed method when they need to use quantitative and



qualitative research to solve a problem (Sparkes, 2014). A mixed method was not appropriate for this study because I did not use the quantitative method to test hypotheses.

Researchers use case study research design to explore an in depth understanding and analysis of a case that involves an event, a program, or activity (De Massis & Kotlar, 2014). The case study design was appropriate to explore retention strategies to increase the retention of a nonprofit workforce. Researchers use a phenomenology approach to describe the meanings of subjective experiences of their participants (Vagle, 2014). I did not conduct a phenomenological study because the phenomenological design is an approach to studying human experience from those who have experienced the phenomenon. Researchers use an ethnography design to study groups, individuals, and their cultures (Letourneau, 2015; Reich, 2015). I did not choose the ethnographic design because the study of group culture was not the purpose of this study.

### **Research Question**

The research question for this study was as follows: What strategies do leaders of nonprofit organizations use to retain their workforce?

### **Interview Questions**

1. What strategies do you use to retain your workforce?
2. What were the key barriers to implementing your organization's strategies for employee retention?
3. How did your organization leaders address the key barriers to implementing strategies for workforce retention?

4. How did these implemented strategies help you hire and retain your key employees?
5. How do you assess employee needs in your retention strategies?
6. What more would you like to share about the strategies you use to retain your workforce?

### **Conceptual Framework**

Maslow's (1943) hierarchy of needs theory was the lens I used for this qualitative single-case study. Maslow's hierarchy of needs theory has a place in the process of developing strategies to retain a workforce. Maslow's hierarchy of needs theory addresses the motivational drive of human behavior. Maslow first introduced his research in 1943 and further developed the theory until his death in 1970. Maslow based his theory on the belief that the five basic needs—physiological, safety, belongingness, esteem, and self-actualization—are critical to motivating humans to accomplish desired results (Maslow, 1943). Maslow contended that humans are motivated by the obtainment or scarcity of the need most important to each. Maslow's theory is important to organizational commitment, organizational leadership, and personal needs of employees, which are prominent factors that can influence workforce retention (Allen et al., 2016; Allen & Shanock, 2013; Fisher & Royster, 2016).

### **Operational Definitions**

The following are the terms used throughout the study for purposes of the research:

*Effective:* Determining effectiveness requires (a) evaluating how well the process aligns with the organization's need and how well it is deployed, or (b) evaluating the outcome of the measure as an indicator of process or product or service performance (Baldrige Performance Excellence Program, 2017).

*Mission:* An organization's overall function to achieve the desired accomplishment. The mission might define customers or markets served, distinctive or core competencies, or technologies used (Baldrige Performance Excellence Program, 2017).

*Retention:* Retention is an action that organization leaders take to encourage professionals to maintain employment with the organization for the maximum period of time (Pittino, Visintin, Lenger, & Sternad, 2016; Ratna & Chawla, 2012).

*Strategies:* Strategies are deliberate guidelines that organizational leaders use to make decisions that concern their organization's future and ability to produce desired results (Iyamabo & Otubanjo, 2013).

*Turnover:* Turnover refers to employees voluntarily leaving an organization within a specified time period (Jaramillo, Mulki, & Boles, 2013).

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

#### **Assumptions**

Assumptions associated with a research study are conceptualized views accepted as plausible truth (Foss & Hallerg, 2013). Assumptions serve as unconfirmed points that researchers use to move forward with a study. The primary assumption of this study was that a nonprofit's workforce is a critical aspect to facilitate desired organizational

performance based on the nature of the nonprofit's mission and stakeholder needs. I analyzed organizational documentation provided by participants and identified an organizational need to increase the number of employees employed by the nonprofit because of strategic importance to the nonprofit's mission and vision. The nonprofit's workforce regularly interacts with various inner-city stakeholders, volunteers, and entities. A nonprofit organization's workforce may offer an increase in creativity, productivity, skill, and improved reputation. Another assumption was that using semistructured interviews and company documentation as sources will result in a deeper understanding of the employee retention phenomenon at the nonprofit organization. Also, I assumed that the population of senior leaders chosen for this study would offer truthful and unbiased knowledge of the nonprofit's turnover and retention characteristics and insights for exploring strategies related to employee retention. I also assumed that a single-case study would provide sufficient data and information about the phenomenon of retaining a nonprofit workforce to gain insight and address the central research question.

### **Limitations**

Limitations refer to conditions of a study that have an effect on research scope and the outcome of a research study (Holloway & Galvin, 2017). Researchers discuss research limitations to provide an assessment of dependability of findings (Marshall & Rossman, 2016). For this study, interviews were restricted to members of the nonprofit's senior leadership team. Half of the nonprofit's senior leadership team met the participant eligibility criteria to provide data. The number of members in the organization's leadership team was a limitation of this study. Interviews were limited to members of the

organization's senior leadership team. Another limitation was the size of the organization. The organization has fewer than 50 employees. The scope of this study was limited to an organization in the nonprofit sector.

### **Delimitations**

Delimitations are boundaries that narrow the scope of a study (Marshall & Rossman, 2016). The boundaries of this study included the interview questions that relate to organizational employee retention and the use of the Baldrige Excellence Framework. The study participants I chose are senior leaders with at least two years with the nonprofit. Each of the senior leaders is associated with the same nonprofit in the Washington, DC, area and have experience with the nonprofit's employee retention efforts. These delimitations were set to ensure this study's participants had the critical experience as a senior leader and had familiarity with the nonprofit's employee turnover. I did not interview subordinates or interview any other leaders associated with the nonprofit. I used the Baldrige Excellence Framework to gain a holistic or systems-based perspective and understanding of the nonprofit organization. A consultant-researcher can acquire a systems perspective on the components that exist within an organization using the Baldrige Excellence Framework.

### **Significance of the Study**

This study might be valuable to the practice of business because, according to Bryant and Allen (2013), the effectiveness of strategies to retain employees has significant implications that impact the performance, financial health, and strategic capability of firms. Failure to comprehend the significance of employee contributions

and employee retention may lead to a flawed strategy to achieve organizational success, address employee needs, and retain key employees. As the economy improves, the organizational challenge of keeping the best talent will intensify (Surji, 2013). Strategies to retain employees are invaluable to the improvement of nonprofit operations and competitiveness, and critical to counter the high cost of employee turnover.

The implications for positive social change include the potential to help nonprofit leaders address the social mission crucial to the success and well-being of key stakeholders. The hiring and retention of employees are essential to nonprofit organizations' capability and capacity to achieve their social missions. This study's findings may catalyze positive social change because, according to De Neve, Diener, Tay, and Xuereb (2013), an effective retention strategy is a critical step to improve internal and external social interactions that benefit nonprofit employees, communities, and individuals who rely on nonprofit organizations.

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

The purpose of this qualitative single-case study was to explore strategies leaders of nonprofit organizations use to retain their workforce. In this literature review, I give a comprehensive summary of the research topic. I sought to understand employee retention from various perspectives in multiple sectors and expand my knowledge of the nonprofit sector. I explored strategies that organizational leaders have used to reduce voluntary turnover and establish effective retention policies. I organized the literature review in topic categories: (a) Maslow's hierarchy of need theory's application to the business problem; (b) criticism, support, and contrasting theory; and (c) nonprofit

organization characteristics, the cause of voluntary turnover, consequences of turnover, and retention strategies. I structured the review of retention strategies to align with the tenets of Maslow's hierarchy of needs from the basic needs to higher order needs of Maslow's model. I present the literature review this way to offer a comprehensive evaluation of scholarly literature on employee retention strategies and the application of Maslow's hierarchy needs theory to the business problem. I culled scholarly articles from multiple databases including: Walden University's online library, Google Scholar, ProQuest, SAGE, and EBSCO. Keywords for searching included *turnover, strategy nonprofit turnover, employee turnover, employee retention strategies, organizational commitment, employer-employee relations, nonprofit employees, employee turnover in nonprofits, nonprofit retention strategies, Maslow hierarchy of needs and retention strategies.*

I also examined information on websites such as those for The Bureau of Labor Statistics, Nonprofit HR, and Nonprofit. I critically analyzed each of the sources with a focus on scholarly literature from researchers that addressed (a) employees and motivation, (b) employee-organizational relationship, (c) organizational commitment, (d) retention strategies, and (e) turnover in nonprofits. Maslow's (1943) need theory has long been a useful theory to assess employee motivation (Clegg, Kornberger, & Pitsis, 2016). The implications of Maslow's research indicate that employees' motivation lies in the satisfaction of their needs. Needs vary depending on the employee and the various factors and considerations that are intrinsically important to the individual. During my search for scholarly literature, I explored peer-reviewed journals in search of articles

about employee retention, nonprofit employee turnover, and nonprofit employee retention strategies. The literature review contains a critical analysis and synthesis of various sources that I used to conduct in-depth research on the study topic. To get an in-depth understanding of employee turnover and retention, I reviewed scholarly literature by researchers that examined the nonprofit sector and other sectors. I also reviewed publications from outside of the United States to expand the scope of my search for scholarly literature on employee retention. The literature review consisted of 324 peer-reviewed studies of which at least 85% were published within the last 5 years. I also used 26 books to compose the literature review. A total of two nonpeer-reviewed articles, websites, and books have publication dates after December 2012. The list of sources for this study included a total of 423 references of which 340 have publication dates within 5 years.

### **Conceptual Framework**

Maslow's hierarchy of needs theory is the conceptual framework for this study. Maslow (1943) introduced his hierarchy of needs theory with a brief review of his theory's proposed fundamental needs and later Maslow (1970) defined his theory and description of the needs. Maslow, a psychologist, sought to formulate and present a theory that offered an understanding of the motivational drivers or "needs" of human nature that may encourage desired behavioral results for an individual. The central thesis of Maslow's theory is that human needs exist within a hierarchy of critical basic needs to higher level needs. Maslow composed his hierarchy in the order that he suggests individuals view as essential and seek to realize: physiological, safety, belongingness,



esteem, and self-actualization. Physiological and safety are the foundational base needs, followed by the higher needs, social interaction, esteem, and at the top of the hierarchy is self-actualization, or the need for persons to learn, grow, and reach their potential (Maslow, 1943).

A person may not satisfy the next higher need unless the lower need has been met (Maslow, 1970). The psychologist contended basic human needs consist of an order of relative prepotency (Maslow, 1943). A key point to note is that the lowest unmet need for an individual is most dominant until the need has been met. Once an individual gains gratification from obtaining the desired need, the next higher need on Maslow's hierarchy becomes a starting point of motivation and corresponding actions. Another key point is that Maslow noted the fluctuation of the importance placed on each need from individual to individual. For example, someone lacking food and starving in a war zone can be oblivious to danger when in search of food (Maslow, 1970). Maslow noted that a person may live by a desired basic need alone when there is a severe scarcity of the need in the person's life. People are different and motivated by different needs that they believe will contribute to their development and actualization to reach their full potential and capacities. An individual's behavior or actions contribute to the satisfaction of the most desirable basic need. The individual will view actions as less important when they do not directly contribute to the obtainment of the desired need (Maslow, 1943).

Maslow's hierarchy of needs theory is a significant contribution to the field of organizational behavior and management research because of the practical implications of the theory's use in organizations. Motivation theories such as Maslow's are sources of

information for researchers and managers to learn about the levers of motivation that lead to action in workers (Lee, Raschke, & St. Louis, 2016). An understanding of employee motivation is critical to develop employees into self-actualized individuals and synergize desired organizational results concurrently (Kaur, 2013). Therefore, understanding the five components of Maslow's hierarchy of needs theory is vital to assess the motivational and developmental needs of employees in order to boost employee retention.

**Physiological needs.** Food, drink, and adequate sleep are physiological needs to sustain life. Hence, the lower basic needs are most important to an individual. Maslow (1943) contended that a person who lacks food, safety, love, and esteem, would desire food more than the other needs. Consequently, motivation and consummatory behavior will stem from physiological needs for a human experiencing a severe scarcity of all five components of Maslow's critical needs. Taormina and Gao (2013) conducted a quantitative study of Maslow's needs by developing viable measures for the needs and assessing their relationships to each other to theorize antecedents and outcome variables. The researchers found that satisfaction of physiological needs is a significant consequential indication of the satisfaction of all four of Maslow's higher needs. Taormina and Gao supported Maslow's suggestion that physiological needs are a critical foundation for a person's capability to satisfy other hierarchal needs and that satisfaction of the lower-level needs indicates satisfaction of the next higher-level need.

**Safety needs.** Safety needs emerge upon gratification of the physiological needs (Maslow, 1943). Maslow (1970) contended safety needs consist of a person's sense of security, stability, protection, or order. Maslow stated that safety needs might serve as

the single most exclusive organizer of a person's behavior because the need for safety can become a dominant mobilizer of the person's capacities to establish order or security. It is human nature to desire a safe and secure place that protects from dangers in a person's environment as well as the need for financial security that establishes a stable life (Maslow, 1970). Gouveia, Milfont, and Guerra (2014) suggested that such needs of security cognitively represent the value humans place on existence. Therefore, a person's value of existence is an expression of the need to assure the basic conditions for individual biological or psychological survival. In the broader sense of safety and stability, Maslow (1943) highlighted the human need for familiarity rather than unfamiliarity and the tendency to organize the universe and other people as a safety-seeking mechanism.

**The love and belonging needs.** Once gratification of physiological and safety needs are met, a person aims to satisfy the need for love, affection, or belongingness (Maslow, 1943). Maslow contended that an individual is motivated to seek meaningful relationships with others and strive to establish a place in affiliate groups. A person has the motivation to belong as related to the profound connections gained with family, friends, community, and social groups. Maslow proved that his work on motivational theory was a significant construct to a substantial number of subsequent researchers on human motivation (Slaten, Ferguson, Allen, Brodrick, & Waters, 2016). A person's sense of belonging depends upon a fit between the person and their external or social worlds having shared and complementary characteristics. Belonging is possible through a person's potential and desire for meaningful involvement and potential for shared or

complementary characteristics (Lambert et al., 2013). Mohamed, Newton, and McKeena (2014) sought to explore factors that contribute to Malaysian nurses' sense of belonging in the workplace and found that "fitting in," respect, and group harmony were critical to their sense of belonging. Based on their findings, Mohamed et al. supported Maslow's research findings that individuals seek love and affection from others.

**The need for esteem.** Maslow (1970) contended that all people want self-respect, self-esteem, and the esteem of others. Maslow's categorized esteem needs into two subsidiary sets. The first set consists of the desire for strength, achievement, adequacy, competence, confidence, and freedom. The second set is the desire for reputation, status, fame, dominance, recognition, attention, dignity, importance, and appreciation. A person gains a greater feeling of self-confidence, worth, and capability when self-esteem needs are satisfied (Maslow, 1970). Maslow (1943) noted that scarcity of the esteem needs produces a sense of inferiority, weakness, or a feeling of helplessness. Ferris, Lian, Brown, and Morrison (2015) argued that one's self-esteem level correlate to behavioral outcomes as an individual engages in behavior alternately to verify their self-perceptions. Marshall, Parker, Ciarrochi, and Heaven (2013) found a distinct relationship between self-esteem and the perception of increased quality of support and network size for an extended period. Marshall et al. supported Maslow's (1970) theory that the most stable and genuine form of self-esteem is based on deserved respect from others rather than on external fame or unwarranted adulation.

**The need for self-actualization.** Self-actualization is the highest need within Maslow's hierarchy of needs theory. The premise of this highest need is that an

individual desires self-fulfillment by reaching their full potential. Maslow stated the self-actualization theory by explaining the desire of the musician who must make music and of the poet who must write. When individuals becomes everything they can become, they achieves self-actualization. Self-actualization is qualitatively unique in comparison to the other needs (Maslow, 1970). Self-actualization is an individual's quest to be creative, grow, acquire knowledge, and develop their abilities further (Ivtzan, Gardner, Bernard, Sekhon, & Hart, 2013).

Obtaining self-actualization allows an individual to present their true essence, talent, and capabilities. However, a person cannot achieve this highest need without the satisfaction of the four lower needs. Maslow (1943) contended an individual with a chronic lack of the basic needs is considered "unhealthy." Conversely, a "healthy" person in the sense of the hierarchy of needs theory is an individual who is motivated and close to the obtainment of the needs to develop and actualize to the fullest potentialities and capacities. Researchers (Gatling, Kim, Milliman, 2016; Lee, Back, Chan, 2015) have noted the importance of employees' satisfaction of self-actualization concerning the quality of work-life balance, job satisfaction, engagement, and employee motivation.

Employees' motivation is intrinsically linked to the orientation of their work and how the workplace complements the employee's greatest needs and desires for growth (Osabiya, 2015). Self-actualization is a vital link to natural development and motivation of who a person is internally (Maslow, 1970). It is important to consider the workplace factors that minimize or enhance a person's potential and effort to reach and satisfy Maslow's self-actualization level of need.

### **Research Findings Using Maslow's Hierarchy of Needs Theory**

Maslow's hierarchy of need's theory is a dynamic framework that leaders can use to understand better workforce issues they constantly encounter and assist in the development of appropriate courses of action. Researchers (Fisher & Royster, 2016; Singh & Behera, 2016; Babic, Kordic, & Babic, 2014; Kellerman, 2014; Zameer, Ali, Nisar & Amir, 2014; Ozguner & Ozguner, 2014; Jerome, 2013; Gouveia et al., 2014; Mousavi, 2013; Brower & Mahajan, 2013; Kaur, 2013) have used Maslow's theory of needs and noted the theory's applicability to assess human nature and motivation that may lead to desired performance and organizational results.

Zameer et al. (2014) used Maslow's hierarchy of needs theory as a lens to explore the impact of motivation on employees' performance within the beverage industry in Pakistan. The results of their quantitative study indicate that motivation is positively interrelated with employee performance. Zameer et al. contended human needs influence employee motivation and that organizational leaders must consider enhancement of employee motivational factors such as job enrichment, job security, and reasonable salary to achieve organizational goals.

Babic et al. (2014) developed a questionnaire by utilizing Maslow's hierarchy of needs theory and Herzberg's (1959) Two-Factor theory to examine the differences in satisfaction of motivational needs in public and private health care professionals. Babic et al. noted the difference in satisfaction of valued needs between public and private-industry health care professionals. For instance, Babic et al. found that private health care professionals are more satisfied with their salaries, working conditions, and

opportunities for personal growth and development than their counterparts in the public sector. Concerning Maslow's needs theory, private health professionals are more satisfied with their physiological, safety and self-actualization needs. The working conditions in the public sector may influence the motivation of public health care professionals. Maslow (1943) noted that an individual's motivation is dominated and organized by unsatisfied needs. Babic et al. (2014) align with Maslow's view that his hierarchy of needs is not rigid or of a fixed order because Babic et al.'s results did not indicate there was a significant connection between sociability needs or esteem needs to the health care professionals' valued needs.

Deprivation or satisfaction of a particular need may lead one to reevaluate the desire of needs with the most prepotent need becoming a motivator consciously. One's most prepotent need may coincide with certain job functions and other characteristics. For instance, Zargar, Vandenberghe, Marchand, and Ayed (2014) found a link between complex and challenging jobs with the organizational commitment level of individuals with strong needs for high achievement, competency development and proactive interaction with their work environment. Conversely, the researchers contended individuals with low growth need may perceive their organizational leaders' emphasis on learning and development as a positive social exchange relationship, which reflects Maslow's need for belongingness and social relatedness.

Although Zargar et al. (2014) contended that organizational leaders may encourage employee growth, development, and perception of support that result in lower turnover, Zargar, et al. contended individuals with strong growth needs may also have

intentions to leave their organization to seek opportunities of more growth. Researchers (Zameer et al. 2014; Babic et al., 2014; Zargar et al., 2014) have supported the tenets of Maslow's hierarchy of needs theory that one's needs can act as a motivator.

Additionally, an individual who has his or her most valued need satisfied is more receptive to a deprivation of that need. Conversely, an individual regularly and chronically deprived of valued needs will react differently than someone who has never been deprived (Maslow, 1943). These implications suggest senior organizational leaders must invest into learning their employees by understanding what is important to them in relation to Maslow's needs theory.

Dhiman (2017) and Kaur (2013) contended senior leaders can assist employees in their efforts to reach a state of self-actualization; however, leaders must have an accurate assessment of their employees needs to keep them motivated. Satisfaction of employee needs will positively influence organizational culture, human resource management, and employee performance that impacts organizational results (Jerome, 2013). Conrad, Ghosh, and Isaacson (2015) contended that continuous monitoring of employee motivation needs and effective implementation of motivation measures would enhance employee commitment to excellent work and support retention efforts. Researchers (Fisher & Royster, 2016; Safiullah, 2015; Dipietro, Kline, & Nierop, 2014; Zameer et al., 2014) have shown that organizational leaders must consider various distinct workforce needs and characteristics and how they relate to critical sector factors. Moffett, Frizzell, Brownlee-Williams, and Thompson (2014) used Maslow's hierarchy of needs theory as a lens to evaluate key motivators for teachers. In their research, Moffett et al. found



evidence in support of the applicability of Maslow's motivational theory in practice and how Maslow aligned his theory with individual needs and intrinsic motivation.

Najjar and Fares (2017) contended leaders can use the tenets of Maslow's hierarchy of needs as a valuable tool to design and implement an effective system to respond to employees' needs. In their study, Najjar and Fares conducted semistructured interviews with two groups of employees and directors responsible for employees' motivation. One group had non-supervisory employees who use few skills on their job and have education levels that do not exceed the secondary education level. The other group included employees that conduct mental or clerical work in an office environment. Najjar and Fares sought to investigate the motivational practices of management and the differences of motivation factors.

Najjar and Fares found that a single motivational strategy may not suit the diverse needs and motivational factors of all workers. Hence, people are different and have various needs and goals. Effective leaders align motivational strategies to coincide with the critical notion that motivation is a need to direct behavior toward a desired end goal (Moffett et al., 2014). Najjar and Fares added that organizational leaders should tailor job attributes to fit the needs of employees which will lead to effective motivational results that help achieve organizational goals. Employees' motivational needs may exist on different levels of Maslow's hierarchy of needs; however, the theory is applicable to any attempt to understand employee needs and development of retention measures (Hanif, Khalid, & Khan, 2013; Jerome, 2013).

### **Criticism of Maslow's Hierarchy of Needs Theory**

Maslow's hierarchy of needs theory has broad support in scholarly literature because of the theory's relevance to organizational leaders' efforts to address critical employee satisfaction and retention issues. However, some have criticized the theory. For instance, Henwood, Derejko, Courture, and Padgett (2015) contended Maslow's (1970) description of self-actualization indicates one's efforts to achieve the higher need because of frustration with failure to achieve obtainment of lower needs. Henwood et al. contended Maslow did not indicate whether adversity and failure lead to self-actualization which Henwood et al. contended would place even less importance on the linear nature of Maslow's hierarchical need structure. Other researchers (Nain, 2013; Adiele & Abraham, 2013; Taormina & Gao, 2013) have criticized Maslow for not considering culture characteristics that may influence one's needs.

Hodgetts (1986) acknowledged the value and usefulness of Maslow's needs theory for managers that want to motivate employees; however, Hodgetts noted that managers would need to know which needs require satisfaction and at which times. Although Maslow did attempt to address slightly how individual differences may relate to his theory, Maslow did not provide a detailed description of how distinct differences may affect motivation and subsequent behavior (Ozguner & Ozguner, 2014). Kellerman (2014) also made a note of criticism about Maslow's theory and the validity of the view that higher needs are innate; therefore, Maslow did not indicate thoroughly how one's environment may influence needs and motivations. Despite the critical critiques, Maslow's introduction of his hierarchy of needs theory made a significant impact on

scholarly research on employee motivation and scholars and managers have taken advantage of the insight they gained from Maslow's hierarchy of needs theory.

### **Supporting Theory: Herzberg's Two-Factor Theory**

Herzberg (1959) developed his two-factor theory after his study of certain workplace factors that affect employee attitudes, satisfaction, and motivation. Herzberg contended that employee satisfaction is a byproduct of certain job-related characteristics such as (a) achievement (b) recognition (c) responsibility (d) advancement (e) employee growth. Herzberg found that employee dissatisfaction tends to develop because of (a) company policies (b) supervision (c) personal growth (d) work conditions (e) salary (f) job status (g) job security. Herzberg analyzed how organizational leaders may assist their workforce to grow and achieve desired goals. In Herzberg's study, participants offered their views on what pleased them and displeased them in their work environment and other work-related characteristics.

Herzberg developed his findings into critical managerial implications. Based on Herzberg's theory, managers must provide what Herzberg called, hygiene factors, to limit employee dissatisfaction. Characteristics such as job satisfaction and compensation are some of the factors that lead to employee dissatisfaction, which often causes motivated behavior in employees. Managers need to offer their employees the factors, or "motivators," that are intrinsic to working conditions that will help gain employee satisfaction with their job and the organization. The notion is that managers should offer reasonable wages, create a supportive work culture, and provide job security. Concurrently, managers should recognize employees, distribute responsibility, and help

their employees grow. Herzberg contended that important factors such as job satisfaction, communication, and motivation directly influences the reduction of employee turnover.

Derby-Davis (2013) used Herzberg's two-factor theory to explore the factors necessary to predict nursing faculty's job satisfaction and their employment intentions. Derby-Davis' results indicate that Herzberg's motivation-hygiene factors are influential to job attitudes and the intent of nursing faculty to stay in academe. Jansen and Samuel (2014) found that intrinsic and extrinsic motivational factors have a significant impact on organizational goals and performance results. Jansen and Samuel sought to identify and model factors that motivate middle-level managers within the context of Herzberg's theory. Jansen and Samuel contended organizational leaders must merge intrinsic and extrinsic motivational factors to develop strategies to influence employee behaviors.

Particularly, improvement and fulfillment of hygiene factors may lead to improved employee performance (Ghazi, Shahzada, & Khan, 2013). Holmberg, Caro, and Sobs (2017) used qualitative methodology to assess Herzberg's theory and found the theory useful in exploring job satisfaction; however, in contrast to Herzberg's theory, Holmberg et al. findings indicate career advancements were not as influential to employees' motivation and interpersonal relationships are a motivation factor and not a hygiene factor. Nonetheless, employee satisfaction and motivation are dependent on job characteristics and individual motivational factors. Employee performance and organizational success are dependent on an employer's effort to provide necessary tools and satisfaction of needs to motivate employees (Najjar & Fares, 2017). Maslow's

hierarchy of needs research and theory served as an inspiration for Herzberg's later research on employee job satisfaction. Both theories are relevant sources to understand motivational needs and potential behavioral consequences (DiPietro et al., 2014).

### **Contrasting Theory: Vroom's Expectancy Theory**

The tenets of Vroom's (1964) expectancy theory are different from Maslow's hierarchy of needs theory. Vroom focused on the outcome of one's motivation and not on the satisfaction of one's needs. For instance, the expectancy theory is an assumption that one's effort will lead to desired performance or results. Hence, Vroom contended the consequential outcome is one's impetus to perform a certain action or behavior. Vroom comprised his theory with three constructs: expectancy, instrumentality, and valence. Expectancy is one's perception that actions will lead to outcomes. Instrumentality is the belief increased effort may lead to a greater likelihood that outcomes will occur. Valence is a determination of the attractiveness or value of an outcome.

The expectancy theory differs from other motivation theories because Vroom contended an emphasis on a process of cognitive variables that represent individual differences involved with work motivation. Managerial implications accompanying Vroom's theory consist of an effort-to-performance expectancy, performance-to-reward expectancy, and reward valences. Therefore, if using Vroom's expectancy theory as a lens, organizational leaders should focus on the relationships among performance, salary, and motivation (Baumann & Bonner, 2016). Harris, Murphy, DiPietro, and Line (2017) sought to apply the expectancy theory to evaluate the motivation of 755 managers and employees in food service environments and assess the validity of Vroom's theory in

relation to employee compliance with food safety and sanitation regulations. Harris et al. found that the relationship between extrinsic valence and motivation varied dependent on the length of employment in the food industry. However, Harris et al. validated the tenets of Vroom's theory as a tool that leaders can use to motivate employees. Organizational leaders can influence employee behavior by incorporating expectancy, instrumentality, and valence into work characteristics and efforts to enhance motivation (Wood, Logar, Riley, 2015).

Furthermore, Munoz, Miller, and Poole (2015) found support for Vroom's expectancy theory by conducting a study to determine the intention of undergraduate students to participate in professional student organizations. Munoz et al. found that students that took an active part expected rewards that school organizational leaders offered. Vroom contended motivation is a function of values of effort-performance and performance rewarded. Researchers (Aruna & Anitha, 2015; Selesho & Naile, 2014; Hechanova, 2013; Bryant and Allen, 2013) have noted the importance of managing employee expectations to enhance employee retention.

### **Nature of Nonprofit Organizations**

The nonprofit sector is complex because nonprofit organizational leaders strive to secure and maintain adequate financial resources to survive and address specific social missions (Sanders & McClellan, 2014). Nonprofit leaders need and rely on the commitment of employees and volunteers that help nonprofit leaders use their organizations to benefit the public. Nonprofit employees find motivation from their nonprofit's focal mission and support to key stakeholders. However, nonprofit

employees often view their organization as a tool to pursue personal and societal goals which may affect their organizational commitment (Hamann & Foster, 2014). According to the Bureau of Labor Statistics (2014), in 2012 the nonprofit sector accounted for 11 million jobs. Nonprofit leaders' job demands in the sector consist of increased levels of commitment to stakeholder interests and well-being, long work hours, higher workload, stress, and low pay (Hmann & Foster, 2013).

Employees in the nonprofit industry are self-directed, mission-driven, intrinsically motivated individuals (Mohiuddin & Dulay, 2015; Park & Word, 2012). Nonprofit employees often must balance conflicting organizational goals, limited budgets, and scarce resources (Hu, Kapucu, & O'Bryne, 2014). Nonprofit employees endure the challenges and strive to achieve meaningful results for their key communities. Pandey, Peng, and Pandey (2015) contended that value congruence between nonprofit organizations and employees is a key factor in long-term organizational success, employee job satisfaction, and organizational commitment. Effective recruitment and retention efforts in the nonprofit industry must consist of nonprofit leaders' commitment to the values or needs that their employees place on the meaningfulness of their job, adequate income, and job security (Jaskyte, 2014). Employee retention is difficult because of the complexity and differences of employees, such as differences in knowledge, skills, abilities, and diverse needs. Organization leaders will benefit by doing away with a one-size-fits-all retention strategy to develop a strategy that leaders can use to cultivate talent and appeal to a diverse workforce (Solaja & Ogunola, 2016; du Plessis, Sumphonphakdy, Oldfield, & Botha, 2013).

Kang, Huh, Auh, and Cho (2014) found employee intention to leave often stems from characteristics such as Age, wage level, job content, social reputation, and opportunities for career development. An understanding of turnover in the nonprofit sector and the reason for employee turnover intentions is important for critical managerial implications. Voluntary employee turnover can adversely affect a nonprofit's bottom-line and limit effectiveness to achieve organizational mission (Renz, 2016).

### **Turnover in Nonprofit Organizations**

Much like in the public and private sector, nonprofit leaders must mitigate the challenges of employee turnover and implement effective retention strategies. Retention is especially a concern for nonprofit leaders that rely heavily on strategic human capital to deliver services and achieve organizational mission (Walk, Schinnenburg, & Handy, 2014). Employee retention challenges amidst economic scarcity are significant contemporary concerns that nonprofit leaders face (Nonprofit HR, 2016). Senior nonprofit leaders must seek to understand why employees leave their organization for different opportunities and benefits.

An understanding of the reasons for employee turnover intention may help leaders implement appropriate intrinsic and extrinsic motivational incentives that appeal to a workforce made up of different generations, backgrounds, needs, skills, knowledge, abilities, and personal goals. Changes in the workforce that affect work values, attitudes, career mobility and development expectations, require new thinking about strategic efforts to retain the best employees and address internal and external challenges and outcomes (Lyons, Schweitzer, & Ng, 2015). Knapp, Smith, and Sprinkle (2017)



examined variables for predicting job satisfaction and turnover intention for workers in nonprofit organizations. Knapp et al. contended nonprofit leaders invest in understanding how organizational structures and organizational relationships relate to employee outcomes. Employee retention is complex and challenging. Nonprofit leaders must begin to alleviate the challenge of employee turnover by seeking to comprehend the common reasons employees leave their employers.

### **Causes of Employee Turnover**

Gupta and Shaw (2014) contended that employee compensation is one of the most critical influences on the quality and effectiveness of human capital. Compensation is a key factor that organizational leaders use to determine employees' worth, attract potential employees, and retain existing employees (Jain & Bhatt, 2015; Panaccio, Vandenberghe, & Ayed, 2014). Compensation relates to organizational functioning, organizational effectiveness, and employee behavior (Gupta & Shaw, 2014). Pay satisfaction is a significant factor that employees consider with their turnover intentions (Panaccio et al., 2014). Panaccio et al. also found that favorable pay satisfaction may induce a cognitive and affective relation to an organization. A negative relationship exists between pay dissatisfaction and employees' intention to leave their organization (Treuren & Frankish, 2014).

Although pay is not the strongest predictor of turnover (Bryant & Allen, 2013), employee discontent with pay system characteristics often leads to increased employee turnover intentions (Ridge, Hill, & Aime, 2014). A'yuninnisa and Saptoto (2015) examined the direct and indirect effects of pay satisfaction on turnover. In their

quantitative study, A'yuninnisa and Saptoto found that dissatisfaction with pay leads to negative employee emotion that affects their decision to stay with an organization. He, Zhang, and Zhang (2014) assessed how company leaders use Six Sigma DMAIC methodology to reduce voluntary turnover. The researchers found that employees opt to leave their employer because of low salary. A'yuninnisa and Saptoto (2015) and He et al. (2014) determined that financial compensation is a critical catalyst that influences the early stages of employee turnover intentions. Pay dissatisfaction amongst employees new to an industry also leads to an increase in turnover for this employee category (Kim, 2012).

Mosadeghrad (2013) conducted a study to test a theoretical model of the relationship between employees' quality of life and their intention to leave an organization. Mosadeghrad contended employees from a lower educational background are often more dissatisfied with inadequate pay and more likely to leave their organization. Although nonprofit employees seek intrinsic rewards, extrinsic compensation such as adequate wages is necessary to maintain a standard of living. Nonprofit leaders' inability to pay a competitive wage is one of the critical reason employees leave for other nonprofits or to seek opportunities in the for-profit sector (Renz, 2016). Johnson and Ng (2015) found that millennial nonprofit employees are more likely to switch sectors than Generation X employees because of low salaries. Higher pay is one of the significant reasons why employees leave the public sector (Hanson, 2014). Adequate salary is a means for employees to obtain their most basic physiological and safety needs such as food and shelter. Maslow (1943) noted that

physiological needs cease to exist as active determinants of behavior and contended that safety needs are equally dominating within individuals. Employees will become demotivated, dissatisfied, and leave their organization if they do not receive sufficient financial compensation.

**Career advancement, mobility, and employee development.** Another significant factor of employee turnover intentions is career advancement and mobility. A lack of career mobility is detrimental to employee perception of promotability, employee development, competence, and negatively correlates to turnover (Dill, Morgan, & Weiner, 2014). Chan, Mai, Kuok, and Kong (2016) examined the relationships among career adaptability, promotability, and career satisfaction and found that a lack of career advancement is a strong predictor of turnover intention. In the contemporary workforce, people have become increasingly familiar with multiple career transitions and changes, such as internal transfers, job rotations, and switching from full time to part time (Lyons et al., 2015). Employees want control of their progress, and options to advance their career and the opportunities to develop accordingly. Employees today increasingly emphasize learning, skill enhancement, a desire for meaningful work, personal control, and job and career satisfaction (Keating & Heslin, 2015). Upward job and career mobility closely associate with development factors. Employees desire to see a clear career path to develop and remain with an organization. Perception of promotion speed and growth has a significant relationship with turnover intention and a critical reason that organizational leaders do not reduce employee turnover (Biswakarma, 2016; Nawaz, & Pangil, 2015).

In a metaanalysis of 216 samples, Ng and Feldman (2014) sought to examine the factors which impede individuals from having positive perceptions of success in their career. Ng and Feldman found that employees perceive lack of organizational and job support as a career hurdle and significantly related to the perception of lower subjective career success. Nonetheless, success is relative to the needs of the diverse individuals in today's workforce. Retention strategies may only be as effective as organizational leaders' understanding of the needs of their employees and how those needs differ across the composition of the workforce. Tschopp, Grote, and Gerber (2013) and Lyons et al. (2015) noted that younger generational employees and employees with independent career orientations place considerable value on career advancement and mobility. The researchers found a link between job satisfaction, the desirability of a job, career mobility and an impetus to leave an organization. However, Lyons et al. found evidence to support the notion that older generations also seek diverse career paths. Contrary to wide perception, Lyons et al. also contended that younger generational employees desire a traditional career path; however, Lyons et al. contended younger generational employees seek to advance upward much quicker than other generations.

Furthermore, career development remains a challenge for nonprofit leaders despite that the fact that women are 75% of the nonprofit sector's workforce, and women perceive greater opportunities for advancement in the nonprofit sector compared to other industries (GuideStar, 2015; LeRoux & Feeney, 2013). Renard and Snelgar (2016), in their qualitative study, found that nonprofit employees' turnover intentions due to lack of development, associate to their need to achieve intrinsic needs and enhance their impact

on social missions. Stumpf (2014) found that career mobility and promotion are often more important to employees than financial rewards. The lack of career advancement and mobility are among the top workforce retention challenges within nonprofit organizations because nonprofit organizations often have flat organization hierarchies (Knapp et al., 2017; Baines, Campey, Cunningham, & Shields, 2014). Kang, Huh, Cho, and Auh (2014) contended the size of a nonprofit and lack of advancement may tie into nonprofit employees' turnover intentions. After a nonprofit employee receives a range of experience in one nonprofit job, he or she "gets promoted" by seeking and obtaining a higher position with better pay and title in another nonprofit organization or different sector (Weisberg & Dent, 2016; Ban, Drahnak-Faller, Towers, 2003). Understanding of employee career advancement needs, job mobility needs and generational identities, will position organizational leaders to counter turnover intentions (Lyons & Kuron, 2013).

**Stress.** Overworked, stressed and lack of work-life balance are another set of interrelated reasons employees leave their employers (Arshadi & Damiri, 2013). The consequence of such factors is job burnout that negatively affects employee organizational commitment (Beheshtifar & Omidvar, 2013). Burn out is a prolonged response to chronic emotional and interpersonal stressors on the job that affects exhaustion dimension and decreases levels of job satisfaction due to excessive workload, lack of control and information (Beheshtifar & Omidvar, 2013; Chong & Monroe, 2013). The negative effects of work stress and eventual burnout is detrimental to employee physical and mental health that leads to poor performance (Ratnawat & Jha, 2014). Job-related stress may also lead to increased levels of workplace accidents, employee

absenteeism, and other adverse employee behaviors (Useche, Cendales, Alonso, & Serge, 2017; Jeon et al., 2014). The prolonged nature of chronic work stress and burnout has a distinct link to employee turnover (Finney, Stergiopoulos, Hensel, Bonato, & Dewa, 2013). Consequentially, the exodus of key employees undermines organizational capability and performance (Hausknecht & Holwerda, 2013).

Usman Ali, Raheem, Nawaz, and Imamuddin (2014) found that excessive workload, role conflict and ambiguity and inadequate monetary compensation are substantial reasons why employees become stressed, reduce their efficiency, and ultimately leave their organization. Conversely, Mosadegharad (2013), in a quantitative cross-sectional research study of 296 nurses, found that inequality, lack of promotion, job security and lack of managerial support are attributable factors that lead to employee stress and increased turnover intention. Therefore, one could conclude there is a link between employee stress their physiological, safety, and belonging needs (Maslow, 1943). Specifically, safety needs because Maslow (1943) stated that one's expressions of safety needs might stem from a preference for a job with tenure, protections, monetary savings, health, livelihood insurances and freedom from unfamiliarity. Acikgoz, Sumer, and Sumer (2016) contended that when people are stressed, they strive to limit the loss of net resources such as objects, conditions, personal characteristics, and energies. Acikgoz, Sumer, and Sumer indicated employees become more likely to leave an organization when these resources become jeopardized.

Hamann and Foster (2014) conducted a study to assess the perceptions and attitudes of a collective of 900 employees in for-profit, nonprofit and public nursing

homes to examine sectoral differences in workload, decision making control, managerial support, job satisfaction, and organizational commitment. Hamann and Foster found that nonprofit employees report higher workloads and higher stress levels than their for-profit counterparts. Light (2002) found that nonprofit employees often express high levels of stress and burnout, and indicate their organizational leaders neglect to provide appropriate training opportunities or the necessary staff to achieve success. Newton and Teo (2014) used a sample from five human service nonprofit organizations in their study to investigate the potential to reduce the effects of work stressors on employee adjustment. Newton and Teo contended nonprofit leaders do more to match potential employees to their organization's work and mission to ensure employees are committed to organizational performance despite occupational stress typical of nonprofit work.

However, Glicken and Robinson (2013) took a different approach to analyzing employee stress typical of nonprofit work and contended that individuals that work within professions to benefit the public often experience compassion fatigue. For instance, Glicken and Robinson advocated that nonprofit employees are susceptible to secondary traumatic stress due to the emotional trauma of caring for others in need. The result of such secondary traumatic stress leads to decreased engagement and eventual turnover (Glicken & Robinson, 2013). Although nonprofit employees find motivation from their intrinsic goals and desires, low compensation, excessive workloads, burnout, and employment uncertainty lessen the motivation and mission focus that attract and retain employees in the nonprofit sector (Baines et al., 2014). The stressful nature of

nonprofit work requires that leaders monitor and manage employee relations to develop effective strategies to retain top employees (Selden & Sowa, 2015).

**Organizational culture.** Organizational culture is a powerful social force composed of leader and workforce values, beliefs, behaviors, and norms (Stokes, Baker, & Lichy, 2016). An organization's culture is a decisive element of organizational success and capability. For instance, innovative development often thrives because of a supportive organizational culture (Hogan & Coote, 2013). Organizational culture is also an influence on productivity, achievement of goals (Aier, 2014), employee morale and performance (Pinho, Rodrigues, & Dibb, 2014; Arunchand & Ramanathan, 2013). Researchers (Hamidi, Mohammadibakhsh, Soltanian, & Behzadifar, 2017; Kangas et al., 2016; Timms et al., 2014) have shown a link between organizational culture and employee commitment to their organization.

An employee's embeddedness is stronger when an organization's culture is congruent with the employee's values, job demands and career goals (Peltokorpi et al., 2014). However, turnover closely associates with organizational culture when employees perceive the culture to be negative (Perkins & Arvinen-Muondo, 2013). The rate of turnover may increase when employees do not accept or conform to the dominant culture that exists within an organization (Habib, Aslam, Hussain, Yasmeen, & Ibrahim, 2014). An employee's need to fit in within an organization's culture has a close relation to Maslow's (1943) suggestion that individuals need belongingness and esteem. Maslow stated an individual desires respect from others and affectionate relationships with people within a close group. Maslow contended one feels inferior, helpless and maladjustment



when the two needs are not satisfied. Allen and Shanock (2013) collected longitudinal data from 500 employees in 27 locations under a large organization to assess the connection between organizational socialization implications and employee turnover. The socialization tactics consisted of initiatives that entail support, care, and social exchanges. Allen and Shanock found that socialization tactics are an influence on voluntary turnover and job embeddedness through affective commitment. A supportive organizational culture is a critical factor towards creating employee satisfaction and building organizational commitment (Banaszak-Holl, Castle, Lin, & Spreitzer, 2013).

However, Robinson, Kralj, Solnet, Goh, and Callan (2014) found no relationship between organizational fit, organizational link, and organizational commitment. Robinson et al. contended the 'sacrifice' of leaving an organizational culture with leaders who support training and career development more influential on an employee's decision to leave their employer. Robinson et al. noted that employees might be aware of similar working conditions and social opportunities specific to their industry that may not influence their feelings to remain committed to an organization. Robinson et al. findings are congruent with Zhang, Fried, & Griffeth (2012) in that Zhang et al. findings do not indicate a commitment to an organization or job because of the informal or formal connection that exists between an employee and the organization or coworkers.

However, social connection and commonality are critical aspects of nonprofit organizations because leaders and the workforce unite together to achieve a social mission. Therefore, in nonprofit organizations, close connection with an organization's culture increases the likelihood of one's organizational commitment. Researchers (Patil

& Ramanjaneyalu, 2015; Saeed, Waseem, Sikander, & Rizwan, 2014; Lambert, Griffin, Hogan, & Kelley, 2014) have shown that turnover rates decrease when there is an increase in employee organizational commitment. Pinho et al. (2014) sought to explore the relationship between organizational culture, market orientation, organizational commitment, and organizational performance in nonprofit organizations. Pinho et al. found nonprofit leaders can use organizational culture to encourage employee commitment. Nonprofit employees are motivated by their needs and expect more than fair treatment and adequate financial compensation; they desire to work in a trusting and open environment that contributes to personal growth, support, and their overall well-being (Pinho et al. 2014). Fu and Deshpande (2014) found that a sense of shared values and caring work environment increases organization commitment regardless of age, education, gender, job, and work experience.

**Leadership.** Researchers (Chaudhry, Yuan, Hu & Cooke, 2015; Byrne et al., 2014; Mosadeghrad & Ferdosi, 2013) have shown that organizational leaders influence various organizational outcomes because of the unique position they hold and the responsibility conjoined with their position of leadership. Organizational leaders have input at multiple levels throughout their organization and continuously shape employee attitude and their commitment to organization initiatives (Appelbaum, Degbe, MacDonald, & Nguyen-Quang, 2015). At both the macro and micro levels of an organization, leaders' behavior and actions impact employees' decision making processes. As contended by Waldman, Carter, & Hom, (2015), organizational leaders play an integral role in an employee's turnover intentions and behavior. A lack of

encouragement and confidence building efforts from organizational leaders may cause employee burnout and an adverse effect on employee turnover (Papathanasiou et al., 2014; Rafferty & Griffin, 2004). Lackluster management skills often cause employees to become frustrated and leave their organization (Tse, Huang & Lam, 2013). Idris (2014) explained that leaders with inappropriate leadership style adversely influence employee turnover. Bourne and Jenkins (2013) contended that leaders may sanction organizational values, beliefs and unwritten rules that may not reflect the values of some in the workforce. Organizational leaders affect employee organizational commitment and employee turnover partly because of the values they cultivate throughout the organization (Gehman, Trevino, & Garud, 2013).

Mathieu, Fabi, Lacoursiere, and Raymond (2015) and El-Nahas, Eman, and Ayman (2013) found that leaders' behavior influences turnover intention as an indirect result and effect of employee job satisfaction and organizational commitment. An employee's intention to leave an organization is more likely when organizational leaders' behavior becomes negative and adversely affect job satisfaction and organizational commitment. Mathieu et al. found that organizational leaders' person-oriented leadership behavior is more effective to employee turnover intentions than leaders that are task-oriented. Maslow (1943) noted that individuals are different and tend to act in a way that will contribute to the satisfaction of their distinct needs. Individuals are less likely to act in a way that does not contribute to the satisfaction of basic needs (Maslow, 1943). Kovjanic, Schuh, and Jonas (2013) found that transformational leaders induce the satisfaction of employee needs and enhance their work engagement. Burns (1978)

contended that transformational leaders engage followers and help them develop and achieve their full potential and satisfaction with higher needs. Maslow contended self-actualization is one's self-fulfillment of potential. Therefore, an individual seeking to self-actualization will have the motivation to develop and achieve his or her full potentialities and capacities (Maslow, 1943). Organizational leaders must recognize their employees' needs, potential, and goals because leaders are pivotal to employee engagement and development (Allen et al., 2016). Researchers (Rahman & Nas, 2013; Ashar, Ghafoor, Munir, & Hafeez, 2013) have found a link between employees' turnover intention and their development perceptions.

McMurray, Islam, Sarros, and Pirola-Merlo (2012) contributed to scholarly research on workplace practice in the nonprofit sector by showing that leaders influence workgroup climate that results in an organizational context that complements achievement of collective performance goals. Holloway (2012) administered a survey to 87 nonprofit employees to examine their perception of leadership behavior and leaders' effect on the different dimensions of organizational climate in a nonprofit organization. Holloway asserted that leaders must develop close and interpersonal relationships with their employees to reduce turnover and absenteeism. Selden and Sowa (2015) advised that nonprofit leaders make a negative impact on high voluntary turnover when they fail to invest in their employees' training and development, build meaningful relationships and harbor a positive work environment (Posthuma, Campion, Masimova, Campion, 2013). Contrary to Holloway (2012) and Selden and Sowa (2015) findings, Tse et al. (2013) affirmed that leaders positively influence employee intention through their

enhancement of their subordinates' emotional attachment and involvement within their organization rather than personalized relationships.

Tse et al. noted the necessity for leaders to adopt different practices that appeal to a diverse workforce and varying needs. Nonprofit leaders face a significant turnover challenge that threatens the success of their organization's mission; therefore, nonprofit leaders must understand how they affect turnover intentions and focus on an individual needs approach to enhance employee retention efforts (Carpenter & Qualls, 2015; Robineau, Ohana, & Swaton, 2015; Akingbola, 2013). Leaders influence employees' feeling of productivity, motivation, energy, effectiveness, and commitment to the workplace (Lorinkova & Perry, 2014). Leadership actions is a key factor to voluntary turnover (Green, Miller, Aarons, 2013). Leaders contribute to maximized performance and efficient operations when they adjust their behavior to reduce employee turnover (Zhang, LePine, Buckman, & Wei, 2013; Holloway, 2012).

### **Consequences of Turnover**

Organizational leaders must counter high voluntary turnover with all available resources because organizational success depends on the talent that exists within the workforce (Ward, Tripp, & Maki, 2013). Organizations are only as good as their employees. Park and Shaw (2013) found a correlation between voluntary employee turnover and financial performance such as profit, return on investment and return on assets. The consequences of voluntary turnover also include significant time and financial cost that organizational leaders experience to recruit, select, and develop new hires (Call, Nyberg, Ployhart, & Weekley, 2014). Though the exact effect of voluntary

employee turnover is dependent on an organization's sector and leverage of human capital (Park & Shaw, 2013), according to Gurazada and Rao (2013), organizational leaders spend 25% to 250% of an employee's annual salary on replacement costs. Notably, Selden and Sowa (2015) advised that nonprofit leaders that rely heavily on human capital, such as human service nonprofits, with high turnover may experience a significant financial sustainability challenge due to limited resource bases.

Voluntary turnover also affects operational processes (Eckardt, Skaggs, & Youndt, 2014; Mohr, Young, & Burgess, 2012). Based on research findings of their study on a large university, Butali, Wesang'ula, and Mamuli (2013) asserted staff turnover hinders employee productivity because of the reduction of efficient operations. Furthermore, through the process of onboarding, new hires may take a significant period of time to develop and reach their full productivity level (Mazzei, Flynn, & Haynie, 2016). Researchers (Ahmad, Bosua, & Scheepers, 2014; Kong, Chadee, & Raman, 2013) found high employee turnover also erodes tacit knowledge within an organization which adversely affects competitiveness (Asamoah, Doe, & Amegbe, 2014). For instance, Darr, Argote, and Epple (1995) showed in an empirical study that in 36 United States pizza stores, voluntary employee turnover exacerbated knowledge depreciation and poor production. The loss of knowledgeable human capital consequentially affects an organization's quality output (Selden & Sowa, 2015; Bhatnagar, 2013).

In their meta-analytic review of employee turnover, Hancock, Allen, Bosco, McDaniel, and Pierce (2011) found a negative and stronger relationship between employee turnover, customer service, and quality than employee turnover, labor

productivity, and financial performance. Organizations with high rates of employee turnover have a damaged reputation from an internal perspective because high rates of employee turnover is a reflection of the perception employees view of the support they receive from their leaders (Cheng, Jiang, Cheng, Riley, & Jen, 2015; Kang, Gatling, & Kim, 2015). Nonprofit leaders must develop strategic plans to overcome a variety of labor and management challenges with voluntary employee turnover as one of the main priority (Ronquillo, Miller, & Drury, 2017). Voluntary employee turnover is a significant problem that threatens the viability of organizations. Therefore, as recommended by Park and Shaw (2013), leaders must not only understand the reason for employee turnover, they must also develop effective retention strategies to mitigate and eliminate turnover.

### **Retention**

Employee retention is the conclusion of strategic actions that organizational leaders take to motivate and encourage employees to maintain employment and produce within an organization (Deeba, Usmani, Akhtar, Zahra, & Rasool, 2015). Vasquez (2014) stated employee retention is essential to an organization's economic progress and operational production. Researchers (Mamun & Hasan, 2017; Lang, Kern, & Zapf, 2016; Mone & London, 2014; Khan & Du, 2014; Das & Baruah, 2013; Taylor, D'Cruz, Noronha, & Scholarios, 2013; Milman & Dickson, 2013; Park & Shaw, 2013; Ratna & Chawla, 2012) have contended leaders use various retention strategies to eliminate high voluntary employee turnover. Several aspects of retention strategies researchers have contended include training and development (Cloutier, Felusiak, Hill, & Pemberton-Jones, 2015), compensation (Terera & Ngirande, 2014), career advancement

opportunities (Dawson, Stasa, Roche, Homer, & Duffield, 2014), employee engagement (Dawson, Stasa, Roche, Homer, & Duffield, 2014; Karatepe, 2013), organizational fit and recruiting (Jung & Yoon, 2013), employee-leadership relationship (Shukla & Rai, 2015), job satisfaction (Kwenin, Muathe, & Nzulwa, 2013), organizational culture (Mohr et al., 2012), and work-life balance (Deery & Jago, 2015). Organizational leaders must focus on what satisfies and dissatisfies their employees and construct a workplace environment that employees may find motivating and prompts them to remain with their organization (Bayraktar, Araci, Karacay, & Calisir, 2016)

Similar to the tenets of Maslow's hierarchy of needs theory, Bedeian (1993) contended motivation is an internal driving force to fulfill unsatisfied needs and the effort or will to achieve. Employees' personal factors are a critical element of an organization's successful retention strategy. Knapp et al. (2017) examined the relative efficacy of perceived job characteristics and perceived organizational support as variables for predicting job satisfaction and turnover intentions for employees in nonprofit organizations. In their quantitative study, Knapp et al. used a sample size of 196 participants from the nonprofit industry. Knapp et al. expressed organizational leaders need to develop a plan to encourage positive employee morale and retention. Deery and Jago (2015) added organizational leaders should consider personal employee dimensions and focus on strategies that help ease employee stress. As a result, leaders will increase employee work-life balance and benefit from the potential levels of job satisfaction and organizational commitment. Ratna and Chawla (2012) researched employee satisfaction factors and retention strategies and concluded rewards, recognition, and compensation do



not motivate employees as much as training strategies. Nonprofit workers find motivation from intrinsic reward (Leonard, 2013); thus, Ratna and Chawla's findings may be helpful to nonprofit leaders in their effort to develop retention strategies.

Champagne and McAfee (1989) offered strategies similar to Maslow's hierarchy of needs theory such as encouraging social interaction, praise, and recognition, adequate wages, support working conditions, encouraging creativity and participation. Champagne and McAfee contended that employees view leaders as considerate, supportive, and more favorably when leaders implement employee oriented strategies. Leaders must know what motivates their employee because people have various needs and their source of motivation and reason for organization commitment will vary (Lee, Burch, & Mitchell, 2014). Katuma and Kwasira (2015) inferred that organizational leaders must understand their employee needs and develop proactive action plans to reduce the likelihood of losing critical employees. Twigg and McCullough (2014) contended leaders create positive work environments that enhance retention and favorable organizational outcomes. Opportunities to enhance knowledge, skills, and other means of professional development is another strategy that leaders use to retain valuable employees (Chen, Wu, Chang, & Lin, 2013).

Nonprofit leaders should invest in programs to support the development and retention of employees to achieve organizational strategic objectives and reduce turnover. Nonprofits' mission orientation will complement nonprofit leaders' efforts to attract and retain employees (Ohana & Meyer, 2016; Epstein & Yuthas, 2014; Kim & Lee, 2007; Brown & Yoshioka, 2003). Word and Sowa (2017) contended nonprofit leaders must use

strategies to influence individual experiences and organizational realities that may create effective retention in the nonprofit sector. Leadership development programs, compensation programs, and employee relations programs are some of the strategies nonprofit leaders may use to reduce voluntary turnover (Selden & Sowa, 2015). I have aligned scholarly literature about effective retention strategies to the five basic needs of Maslow's hierarchy of needs theory.

### **Physiological and Security Needs**

**Compensation.** Hong, Hao, Kumar, Ramendran, and Kadiresan (2012) and Haider et al. (2015) found a positive relationship between compensation and retention. Hong et al. discussed the value employees give to compensation and contended leaders become cognizant of employees' needs and desire for competitive compensation. Compensation consists of salaries, bonus, incentives, benefits, performance-based compensation (Osibanjo, Adeniji, Falola, & Heirsmac, 2014). Organizational leaders limit voluntary turnover and gain employee commitment and satisfaction partly by ensuring employee compensation is transparent and fair (Osibanjo et al., 2014). Bryant and Allen (2013) contended that organizational leaders must consider how compensation may influence employee morale, clearly communicate pay decisions, ensure fair compensation, and compensate reasonably over time to establish strategic employee retention management.

Bryant and Allen's suggestion is similar to Skarlicki and Folger (1997) recommendation for organizational leaders to incorporate the values of distributional justice into compensation and workload. Barnes, Reb, and Ang (2012) explained the

importance of compensation decisions and contended that the lack of effective compensation may lead to voluntary turnover. Compensation is a critical aspect of employee retention; therefore, organizational leaders must structure compensation systems to meet employee needs (Gupta & Shaw, 2014). Naqvi and Bashir (2015) argued that to establish a successful retention strategy, organizational leaders must offer competitive pay and benefits to motivate employees and to gain employee commitment. Muogbo (2013), and Katuma and Kwasira (2015) contended that compensation is one of the primary tools that organizational leaders use to affect motivation and performance within their workforce. Katuma and Kwasira specifically noted the retention benefit organizational leaders gain from pay increase strategies that are critical to motivating employees for future performance.

Lamba and Choudhary (2013) contended compensation equates to the quality of an organization's workforce, applicants, motivation and performance of the workforce, and the workforce's willingness to remain with a company. Jerome (2013) used Maslow's hierarchy of needs theory as a lens to assess organizational goals and objectives. Based on his findings, Jerome advocates that adequate compensation or financial security is a safety need and that organizational leaders should pay employees fairly to ensure a stable career. Lee et al. (2016) found compensation to be an organizational lever within Maslow's hierarchy of needs to motivate workers. Though nonprofit employees find motivation from intrinsic reward, adequate financial compensation is necessary to obtain basic physiological and safety needs.

**Security.** Maslow (1943) asserted that individuals or employees value a sense of security with their environment. Safety-seeking concerns one's current world outlook, philosophy, and anticipation of future outcomes (Maslow, 1943). Safe working conditions and job security are two factors interrelated to the tenets of Maslow's safety need of his hierarchy of needs model. Employees find motivation and comfort in working environments that they view as safe. In addition, employees are more productive in comfortable working environments (Singh & Jain, 2013). Ozbilgin, Groutsis, and Harvey (2014) stated that organizational leaders could achieve employee retention through an effort to establish favorable working conditions. Ozbilgin et al. advocated for workplace strategies based on employee health and safety issues. Hancock et al. (2011) found a strong relationship between turnover, safety outcomes, and financial performance. Hancock et al. contended organizational leaders focus on safety performance as a proximal outcome for employee retention and organizational performance.

Job security is another factor employees may consider with turnover intention and associate with safety needs (Gharib, Kahwaji, & Elrasheed, 2017). Purohit and Bandyopadhyay (2014) had 92 medical officers from three states in India rank factors of motivation important for their job. Purohit and Bandyopadhyay found that job security to be the most important factor. Purohit and Bandyopadhyay's study may be significant to the nonprofit sector because like nonprofit employees, Purohit and Bandyopadhyay found medical officers find intrinsic motivation from the nature of their altruistic work. Masum, Azad, and Beh's (2015) research indicated that security significantly influenced

employee retention. Masum et al. contended that leaders need to enhance workforce morale, consider employee well-being, and provide training to boost employees' job security satisfaction. Organizational leaders win employee commitment when they offer employees a sense of job security and continuity (Kassa, 2015). Dhanapal, Alwie, Subramaniam, and Vashu (2013) contended that employee perception of job security is a crucial factor that influences job satisfaction and eventual retention. Employee Job security is a common and important indicator of high-performance work practices (Karatepe, Baradarani, Olya, Iikhanizadeh, & Raoofi, 2014).

Further, Karatepe et al. also contended job security is another strategy organizational leaders use to mitigate frontline employees' intentions to voluntarily leave their organization. Word and Park's (2015) findings indicated that job security is an important factor to motivate nonprofit employees and gain their commitment. Work and Park align with Maslow (1943) in support of the notion that individuals take into account their needs, values, and motivations when making behavioral decisions. Work and Park contended organizational leaders tailor strategies to nonprofit employees based on their important characteristics such as gender, job type, and experience. In contrast, Subramaniam, Shamsudin, and Ibrahim (2011) noted that some employees might not value job security because some employees view employment as a "stepping stone" to enhance career development; therefore, employees with this view would not find job security motivating.

**Work–life balance.** Work overload, stress, emotional exhaustion, and work–family conflict are some of the reasons why work–life balance has become a critical

factor to employee turnover intentions (Deery & Jago, 2015; Karatepe, 2013; Lawson, Davis, Crouter, & O'Neill, 2013). Work–life balance is one's perception of a satisfying divide between work and personal leisure to achieve priorities and goals and control between work and personal leisure (Kossek, Valcour, & Lirio, 2014). Organizational leaders must value their employees by committing to their overall well-being (Kurtessis et al., 2015; Kara, Uysal, Sirgy, & Lee, 2013). Flexible work practices tailored to varying workplace and life needs is a viable strategy that organizational leaders use to build mutually beneficial relationships with their workforce (Baldrige Framework, 2017).

Gupta and Charu (2013) advocated that organization leaders enforce work–life balance policies to retain key employees. Boamah and Laschinger (2016) advised that organizational leaders employ strategies to enhance workplace characteristics and conditions to promote a person-job fit and work–life balance to improve retention of staff. Bourne (2015) found that employees in the GenXer age group value a balance between their work and time with their family or social life. Bourne's research findings are similar to Hendricks and Cope's (2013) findings that indicated millennials seek a healthy balance between work and life. Vanderpool and Way (2013) advocated three courses of action to boost work–life balance in the workplace that include (a) adopting family-friendly practices such as flexible work schedules or supporting dependent care efforts to help employees achieve professional and family responsibilities, (b) creating a work culture in support of employees efforts to make use of family-friendly practices without being stigmatized, and (c) develop strategies for intervention such as job redesign or employee transfers to less active positions to reduce employee anxiety and regain their

work-family balance. Nonprofit employees find motivation from supportive work environments and value a distinct balance between work and family (Powell & Cortis, 2016; Park & Word, 2012).

Some nonprofit leaders are now aware of negative outcomes on employees' well-being that stem from work overload and seek to minimize employee burnout and increase employee retention by improving employee work-life balance strategies (Ridder, Piening, & Baluch, 2012). In contrast, Gambles, Lewis, and Rapoport (2006) stated work and leisure are antithetical to each other and label the concept as narrow. Gambles et al. contended work-life balance, in both policy and research terms, is a rhetorical contrivance with no relevance to lived experience.

**Job satisfaction and employee needs.** Organizational leaders can help their employees achieve a heightened level of job satisfaction by addressing employees' needs to ignite their internal motivation drive. Researchers (Herzberg, 1959; Maslow, 1943) aligned motivational theories with employee job satisfaction based on distinct job-related factors and shown the significant relationship between employee behavior, employee motivation, and job satisfaction. Employee motivational factors are critical to organizational leaders' effort to increase employee job satisfaction and employee retention (Kaur, 2013). Similar to Maslow's (1943) suggestion of one's effort to satisfy a need, Nantha (2013) noted that motivation originates from an internal drive to achieve a personal goal. An employee's satisfaction with a job reflects the job's conditions (Han, Trinkoff, & Gurses, 2015). Tschopp et al. (2013) and Saeed et al. (2014) found that an increase in one's job satisfaction will reduce their inclination to leave their employer.

Saeed et al. contended that organizational leaders develop strategies to enhance employee relations with management to decrease the rate of turnover. In agreement, Mbah and Ikemefuna (2012) advocated for a better leader-employee relationship for effective employee retention. Mbah and Ikemefuna went further and argued that employee satisfaction with pay and a sense of autonomy in work add to employee satisfaction and retention. Lee (2015) noted nonprofit leaders hurt employees' job satisfaction when there is a lack of definitive employees' tasks and roles and autonomy in nonprofit operations. Researchers (Kehoe & Wright, 2013; Brandl & Güttel, 2007) contended that nonprofit leaders fail to consider how human resources practices satisfy the needs and unique goals of nonprofit employees, which can hurt nonprofit employees' motivation, satisfaction, and commitment. Katuma and Kwasirea (2015) used Maslow's hierarchy of need theory to assess effective retention strategies and found that to contribute to employee job satisfaction and retention, leaders must understand employee needs concerning career, family, education, and community. Organizational leaders must satisfy employees' expectations and needs by adapting retention strategies to the workforce's unique needs (Earl & Taylor, 2015; Katuma & Kwasirea, 2015; Inabinett & Ballaro, 2014). Clark, Smith, and Uota (2013) found evidence that nonprofit leaders increase employee retention via job satisfaction by offering promotions and yearly training.

### **Belongingness and Esteem Needs**

**Organizational culture.** Researchers (Tang, Liu, Oh, & Weitz, 2014; Azanza, Moriano, & Molero, 2013) have found that organizational culture and values are the most



common factors organizational leaders use to enhance employee retention strategies. An employee's close connection to organizational culture and other employees within the culture is a fundamental element to building organizational commitment (Messner, 2013). Maslow (1943) noted that once an individual or an employee satisfies physiological and security needs, the individual will seek satisfaction of belonging needs. According to Maslow, an individual wants a positive connection with others and therefore will strive to achieve affectionate relations and status within a group setting.

Human relations and team culture is a reflection of human affiliation in a flexible organizational structure, an internal focus on cohesion and morale, and human resource development to build team camaraderie (Cameron, Quinn, DeGraff, & Thakor, 2014). Therefore, organizational culture is the means of understanding how workforce members interact. Pinho et al. (2014) and Wilderom, van den Berg, and Wiersma (2012) revealed a link between organizational culture and human resource moderating factors such as commitment, leadership, job satisfaction and turnover intentions. Lee et al. (2016) contended employee outcomes occur because of the motivation employees find from organizational moderating factors within an organizational culture. Organizational leaders use aspects of organizational culture such as workforce learning, professional development, respect, administrative philosophy, and organizational values to develop effective retention strategies (Brown, Fraser, Wong, Muise, & Cummings, 2013). Creating an organizational culture responsive to employees' needs is not only a prudent start to retaining talented workers but also a viable strategy to attract workers from various generation groups (Gursoy, Chi, & Karadag, 2013).

Karjalainen and Soparnot (2012) noted managers should develop a strong organizational culture and increase interpersonal projects to create a sense of belonging to an organization. Organizational leaders can modify the organizational culture to suit the needs of employees; consequently, workers tend to remain with their employer (Choudhary, 2016). When hiring, it is important that organizational leaders assess an applicant's alignment with the existing organizational culture to by analyzing how well the applicant will fit within the organization (Suifan, 2015; Bishop, 2012). There is a strong bond among nonprofit employees because of mission and the participatory structure and consensus-oriented culture that persist within the nonprofit sector. The need for belonging and cohesion is essential within nonprofit organizations. Mano and Giannikis (2013) contended nonprofit leaders use organizational culture to improve employee strategies by enhancing employee participation schemes, teamwork design, and open communication. Mano and Gianniki contended that a congenial work environment built on mutual respect between co-workers and supervisors would positively influence employee retention. Similarly, Jerome (2013) recommended organizational leaders organize social events for employees, mentor employees on organizational cultural practices, and create a supportive environment to compliment team spirits. Jerome posited that organizational leaders could increase motivation and obtain positive employee outcomes by creating a feeling of acceptance and belonging amongst their workforce.

Maslow (1970) stated that a society or individuals of an organization cannot thrive and achieve a common goal collectively without the satisfaction of belongingness,

love, and affection needs. Leaders must take the lead to shape organizational culture and manage how their workforces use acceptable values, beliefs, and behaviors to achieve a common goal. Nonprofit leaders should invest in human resource strategies and programs they can use to build unity among the workforce, improve employee performance, and influence organizational commitment (Jackson, Schuler, & Jiang, 2014; Ridder et al., 2012).

**Workforce engagement.** Organizational leaders use workforce engagement as a means to develop and empower a workforce to become more active and contribute to overall productivity and performance of an organization (Schneider, Yost, Kropp, Kind, & Lam, 2017; Saks & Gruman, 2014). According to Ratna and Chawla (2012), employee engagement is an optimal strategy to motivate employees and reduce turnover. Eldor (2016) expressed that workforce engagement is a conduit to satisfy mutual needs of organizations and employees because modern organizational leaders are depended on employees' unique physical, emotional, and cognitive connectedness to work, personal life, and community (Harrison & Gordon, 2014). Organizational leaders use workforce engagement to make a positive impact on workforce members' commitment, emotional state, and intellectual health to accomplish organizational work, and mission and to achieve vision (Baldrige Framework, 2017).

Employee engagement strategies include aspects of training, development, recognition, reward systems, equal opportunity, fair treatment, and family-friendliness, that lead to more employee involvement in strategic organizational success (Sulaiman & Seng, 2016). Agarwal, Datta, and Blake-Beard, and Bhargava (2012) argued that work

engagement correlate positively to employee retention as a result of the added benefit of an increase in employee motivation and job satisfaction (Mengue, Auh, Fisher, & Haddad, 2013). Engaged employees champion leaders' policy and direction to obtain desired results. Datt and Washington (2015) and Posthuma et al. (2013) contended that engaged employees are more likely to perform work effectively and aspire to become leaders within an organization. Posthuma et al. noted leadership development and succession planning is a strategy to foster employee engagement.

Shuck, Rocco, and Albornoz (2011) used Maslow's hierarchy of needs theory in their qualitative study to examine an employees' unique experience of work engagement. Shuck, Rocco, and Albornoz found that an employee's personality and motivation affects their level of engagement because employees view work through a lens of their unique life experiences, assumptions, and various personal characteristics. An individual's capacity to engage is an extension of their motivation and sense of competence, autonomy, and organizational support (Barrick, Thurgood, Smith, & Courtright, 2015; Maslow, 1970). Researchers (Kim & Lee, 2007) have found that a nonprofit employee's positive perception of organizational programs and leaders' support not only leads to an increase in engagement, but also employee retention, job satisfaction, a feeling doing rewarding work, high levels of autonomy, responsibility, creativity, and positive perception of organizational culture.

Nonprofit leaders should encourage their employees' intrinsic motivations to enhance employees' willingness to engage in work and remain employed with their organization (Rana, 2015). Nonprofit leaders can use the workforces' identification and

connection to the organizational mission to decrease turnover intentions and implement retention strategies (Pillay, Hofmeyr, & Wöcke, 2014; Kim & Lee, 2007; Brown & Yoshioka, 2003). Word (2012) contended nonprofit leaders increase employee involvement when they support their employee's advancement of human experience and fulfillment of individual needs. Similarly, Hong (2012) concluded that finding meaning in one's job leads to positive outcomes for morale, job satisfaction, emotional burnout, and turnover intentions. Consequently, organizations and communities benefit from an increase in nonprofit employees' motivation and engagement (Merrilees, Miller, & Yakimova, 2017; Word, 2012). Conversely, Brown and Yoshioka, (2003) contended that nonprofit employees might leave an organization despite their commitment and engagement with their organization's mission if nonprofit leaders do not treat employees well if nonprofit leaders do not invest in workforce development.

**Reward and recognition.** Reward and recognition are among the most common practices leaders use to satisfy employees, peak employee motivation, and obtain employee commitment (Fowler, 2014). Leaders reinforce acceptable behavior and performance when they offer and provide appealing rewards for workforce accomplishments (Chomal & Baruah, 2014). De Gieter and Hofmans (2014) conducted a study using survey data from 179 employees and identified rewards as financial (e.g., bonuses), material (e.g., training opportunities), and psychological (e.g., recognition). Organizational leaders should implement training, empowerment, and reward systems simultaneously to encourage employee innovation and gain employee commitment (Karatepe & Karadas, 2012).

Terera and Ngirande (2014) found a positive relationship between rewards systems and employee retention. Organizational leaders construct employee motivation strategies with various rewards, fringe benefits, recognition incentives and retention bonuses to boost employee morale, satisfaction, and employee retention (Katuma & Kwwasira, 2015; Wang, Noe, & Wang, 2014). Smit, Stanz, and Bussin (2015) conducted a quantitative study with a sample size of 303 employees from different industry sectors to identify the total reward components that multi-generations groups prefer as most important for retention. Smit et al. found that performance, career management, work-life balance and variable pay are the common rewards organizational leaders use to retain talent. French and Emerson (2015), and Green and Roberts (2012), in support of Maslow (1943), expressed the importance for organizational leaders to develop reward systems to generational and individual employee needs. For example, Snelgar, Renard & Venter (2013), and Smit et al. (2015) found that women are more receptive to broader total reward packages such as work-life balance and developmental rewards as opposed to financial rewards only.

Women are the majority group within nonprofit workforces in the United States (Lee, 2014); therefore, nonprofit leaders cannot neglect the importance of developing diverse needs-based reward systems that appeal to this demographic group. Idris (2014) contended organization leaders consider recognition as a strategy to retain employees because of the positive and significant relationship between recognition and employee retention (Kassa, 2015). Further, Fallon and Rice (2015) found that recognition is a key element of job satisfaction for organizations with both paid and volunteer workforces

such as nonprofit organizations. Maslow (1943) noted that an individual would feel a sense of self-confidence, worth, strength and capability when the individual obtains recognition, respect or satisfaction of personal self-esteem needs. Organizational leaders show their appreciation for employees' performance and extraordinary achievement by giving rewards and recognition, which results in employees feeling valued (Zeb, Rehman, Saeed, & Ullah, 2014). Nonprofit leaders make a positive influence on organization recruiting, hiring, and employee retention when they create and define a culture of intrinsic reward in nonprofit organizations (Word & Park, 2015).

Park and Word (2012) contended nonprofit leaders offer a sense of accomplishment to nonprofit employees because of the intrinsic nature of nonprofit workforces. Nonprofit leaders can enhance organizational commitment by matching employees' intrinsic motivation to intrinsic rewards such allowing employees to use their knowledge, abilities, and skills freely and reward employees by allowing creative approaches to accomplishing the nonprofit's mission (Khan, Shahid, Nawab, & Wali, 2013). Nonprofit employees commit to the betterment of the community they serve; therefore, their reward is altruistic service and accomplishment. Nonprofit leaders increase job satisfaction and employee retention by rewarding employees with more opportunities to enhance their responsibility, job meaningfulness, and awareness (Bassous, 2015). However, nonprofits leaders cannot neglect the importance of extrinsic reward in retention strategies. According to Tippet and Kluvers (2009), nonprofit leaders can use extrinsic rewards such as bonuses to reward individual accomplishments in benefit of nonprofit mission and reinforce an employee's intrinsic reward of feeling a

connection to the mission and having done something beneficial for the community. Nonprofit leaders must design and merge motivation and retention systems to recognize both the intrinsic motivators that brought staff to the organization and financial motivators such as pay, health care or retirement that are necessary for employees' financial and physical health (Renz, 2016).

### **Self-Actualization**

**Workforce training, development, and support creativity.** Maslow (1943) stated that an individual's desire for self-fulfillment is a need to reach full potential and capabilities within one's abilities. Maslow contended that when physiological, security, belonging and esteem needs are satisfied, one will aspire to achieve more in life and career to become actualized. Self-actualization is a need to reach the ultimate expression of one's self by way of training, development, and creativity. Smith, Farmer, and Yellowley (2013) indicated that organizational leaders help employees achieve self-actualization through the development of employee skills, creativity, promotion and allowing control over their jobs. Haider et al. contended that employee training is key for organizational effectiveness and employee retention. Adzei and Atinga (2012) conducted a study on the impact of financial and non-financial incentives on employee motivation and retention.

Using a sample of 285 health care workers, Adzei and Atinga also found that opportunities for continuing professional development are a predictor of employee motivation and retention. Employees enhance their creativity and innovative approach to improve organizational profitability when they receive training and development



(Jehanzeb & Bashir, 2013). Organizational leaders can invest in employee personal growth by developing training programs and integrating the new training with career opportunities (Vasquez, 2014). Jehanzeb, Rasheed, and Rasheed (2013) found that employees' perception of the availability of training opportunities improves employees' commitment to the organization. Jehanzeb, Rasheed, and Rasheed also contended that supervisors' support for training is a critical aspect of an employee's intention to remain with an organization. Park and Word (2012) sought to explore and compare the similar and different factors that motivate private sector employees and nonprofit employees. Park and Word found that nonprofit employees desire training, career development and job responsibility that may improve their potential for advancement within their nonprofit's hierarchy. Wang and Ashcraft (2012) found that nonprofit employees need professional development training to enhance management skills and gain knowledge relative to the nonprofit sector. Notably, nonprofit employees' intrinsic motivation and desire for training and development is a reflection of the value and pride in which nonprofit employees view their work to benefit stakeholders (Park & Word, 2012).

Despite limited promotion opportunities within the nonprofit sector, nonprofit leaders can demonstrate support for employee development by implementing training opportunities to expand employee knowledge and skills (Awais Bhatti, Mohamed Battour, Pandiyan Kaliani Sundram, & Aini Othman, 2013). Although nonprofit leaders struggle with providing training and development opportunities because of resource constraints (Chang, Huang, & Kuo, 2015), nonprofit leaders should not neglect the importance of employees' need for development. Fallon and Rice (2015) contended that

nonprofit leaders' support for well-tailored employee development programs would enhance employees' job satisfaction and organizational commitment because leaders' support for employee development conveys a message of caring for employees' needs and well-being (Clark et al., 2013). In contrast, Mapelu and Jumah (2013) argued that employee training and career development are not predictors of employee turnover and advocate organizational leaders utilize a variety of human resources strategies and approach to retain staff.

Some employers believe that employees may leave their organization after substantial training and development (Kennett, 2013). Notably, for the nonprofit sector, Kennett (2013) also found that once nonprofit employees receive training and development, nonprofit employees are more likely to leave an organization that has few employment and growth opportunities.

**Career advancement and retention.** Promotions and career mobility are key retention factors that employees consider with turnover intentions (Grissom, Viano, & Selin, 2015; Joao & Coetzee, 2014). Employees want internal job opportunities, job characteristics, resources, and development opportunities that lead to advancement or positive personal change within their organization (Mandel, 2013). Promotions and career development levels are significant achievements for employees because in new positions and job opportunities employees may have more freedom to use their knowledge, skills, abilities, and creativity (Sageer, Rafat, Agarwal, 2012).

Organizational leaders can achieve employee retention by using career development to encourage workers to take on new, more visible, and more challenging assignments.

Internal career and promotion opportunities are among the indicators of high performing workplaces (Karatepe & Vatankhah, 2014; Tang & Tang, 2012). Career planning is a necessary process to decrease employee turnover intention and to secure employee commitment (Das & Baruah, 2013).

Cascio (2014) argued that organizational leaders improve employee retention by promoting from within workforce ranks and helping employees develop their expertise that maximizes their potential and innovation approaches. Organizational leaders can implement performance-based promotions systems and help employees achieve self-actualization by tailoring employees' career progress with training programs (Locke & Bailey, 2013). Mohlala, Goldman, and Goosen (2012) argued that it is necessary organizational leaders design promotion and career mobility retention strategies to the unique sector and organizational challenges. Nonprofit employees serve in the nonprofit sector because of intrinsic and altruistic rewards they receive in their work (Renz, 2016); however, Chen and Bozeman (2013) contended that nonprofit researchers and nonprofit leaders must analyze nonprofit employees' work values beyond intrinsic and altruistic benefits. For instance, McGinnis and Ng (2016) presented findings in support of Chen and Bozeman's view that nonprofit employees also value extrinsic rewards such as promotions.

Kim and Lee (2007) found that nonprofit employees' sense of mission attachment is not as strong when the employees perceive a lack of career advancement opportunities. Word and Sowa (2017) contended nonprofit leaders link management of human resources with the management of organizational goals, by implementing more

transparency in operations and creating opportunities for advancement. In addition, Word and Sowa advocated for an inclusive work environment with positions and opportunities that nonprofit employees find meaningful and satisfactory to their compensation, autonomy, and recognition needs. Nonprofit leaders must develop retention strategies that they can use to keep their organization externally competitive (e.g., compensation, rewards, opportunities, work environment) to limit the appeal of external opportunities for valued employees.

**Leadership.** Researchers (Oladapo, 2014; Tse et al., 2013) have explained that organizational leaders are integral to retention strategies and employee outcomes. Leaders must harness talent, coach career development, (Hagemann & Stroope, 2013), satisfy employee needs (Dugguh & Dennis, 2014), influence employee behavior (Yidong & Xinxin, 2013) and play a vital role to ensure employee performance (Carter, Armenakis, Feild, & Mossholder, 2013). Organizational leaders have the responsibility to elevate their organizations by use of available organizational resources, such as human resources, to produce optimal results (Gini & Green, 2013) To adjoin business outcomes with employee retention, organizational leaders must ensure employee engagement, higher productivity, and employee motivation (Shahid & Azhar, 2013).

Ng and Sorensen (2008) argued that effective leaders facilitate a conducive relationship with employees built on trust, support, rapport and, satisfaction to reach performance expectations and reduce turnover. Leaders influence employee motivation by shaping the work environment, employee responsibilities, supervision, fairness, development, training, feedback, and rewards to satisfy employees' needs and

expectations. The essence of any retention strategy is a mutually beneficial outcome for employees and the organization. The success of an organization depends on the organization's leaders' ability to retain a capable workforce (Mandhanya, 2015). Mohr et al. (2012) advocated for organizational leaders to focus on organizational culture as a strategy to reduce employee turnover. Mohr et al. contended leaders standardize employee tasks and support a group-oriented work culture to boost innovation and employee learning opportunities such as training and development, to make a positive influence on employee turnover intentions and maintain a high performing organizational culture.

Johnson (2014) argued leaders also shape organizational culture and reduce voluntary employee turnover by hiring the right applicants who have characteristics congruent with the enduring organizational culture. Vasquez (2014) and Jing, Avery, and Bergsteiner (2013) stressed the importance of leadership communication to reduce employee turnover. Leaders maintain a positive relationship with employees by establishing two-way communication channels to understand employee needs, ensure positive interactions, gain valuable insight on employee experience and boost employee engagement (Brunetto, Farr-Wharton, & Shacklock, 2012). Leaders should offer opportunities for employees to express their feelings and expectations about work characteristics, incentive programs, training and performance outcomes (Vasquez, 2014). Employee feedback is especially important to manage employee development. Clark et al. (2013) advocated for nonprofit leaders to survey their employees or conduct focus groups to inquire about the training and education programs that employees want or need.

Word and Park (2015) noted an effective training and development plan is a strategy that nonprofit leaders use to gain employee commitment and increase employee retention. Leaders can improve employee training and expand training opportunities to show organizational support for emerging employees' need to reach their full potential (Vasquez, 2014). In support of Word and Park, Adzei and Atinga (2012) used Maslow's (1943) hierarchy of needs theory as a lens to assess employee motivation and found leadership skill, supervision, and opportunities for continuing professional development are critical factors to improve employee retention. Adzei and Atinga noted the effectiveness of using incentives to reduce turnover and added leaders should use financial incentives such as supporting salary supplements and commitment-based bonus payments as retention strategies. Although nonprofit employees lean towards intrinsic rewards such as meaningful work and work-life balance, Tippet and Kluvers (2009) argued nonprofit leaders must consider how to use extrinsic rewards to maintain employee motivation and secure retention. Nair and Malewar (2013) stated leaders could reduce turnover by facilitating employees' work-life balance to ensure efficiency between professional and personal responsibilities. Making use of employees' intrinsic motivation for productive results and guarding against burnout is a confounding issue for nonprofit leaders (Renz, 2016).

Pitt-Catsouphs, Swanberg, Bond, and Galinsky (2004) advised that nonprofit leaders can reduce voluntary turnover by developing work-life balance policies such as flexible scheduling and family leaves. Employee engagement is another strategy leaders can use to reduce employee turnover (Munish & Agarwal, 2017). Leaders must commit

to employee workforce engagement by ensuring management cooperation with the workforce, extensive collaboration between work teams and departments, empowerment of the workforce, personal accountability and workforce input on key goals. When possible, leaders should delegate decision making to allow a decentralized approach to organizational problem solving and use performance measures to evaluate overall employee performance. Employees engagement improves when employees perceive a safe, trusting, transparent and cooperative workforce environment (Baldrige Framework, 2017).

Further, leaders need to understand how their vision for their organization may affect workforce commitment and use communication effectively to build a supportive relationship with employees to satisfy their needs and reduce voluntary turnover (Rafferty & Griffin, 2004). Nonprofit leaders can reduce voluntary employee turnover by taking an active role to ensure fair compensation, work-life balance, job satisfaction, high performing culture, engaged workforce, rewards and recognition, training, and development, opportunities for advancement, and leadership support.

### **Transition**

In Section 1, I detailed the foundation for this study. The section contains a review of professional and academic literature of critical strategies that leaders can use to reduce voluntary turnover in the nonprofit sector. The section begins with the foundation of the study followed by the background of the problem, the problem statement, the purpose statement, nature of the study, and the central research question. Next, I presented the conceptual framework, operational definition, assumption, limitations,

delimitations and significant of the study. Lastly, I reviewed professional and academic literature relevant to the research context of this study and the conceptual framework. I used Maslow's hierarchy of needs theory as a lens to analyze employee retention and establish a conceptual foundation for this study.

Section 2 contains an indepth description of the project to include details on my role as researcher, participants for this study and research method and design to complete this study. Section 2 also includes an explanation of the ethical responsibility I have as a researcher and how I collected data, organized the data, and analyzed the data. I concluded Section 2 with an assessment of the reliability and validity of my study. In Section 3 I detailed my use of the Baldrige Performance Excellence Framework (2017) to conduct a comprehensive analysis of my client organization. Consistent with the Baldrige Performance Excellence Framework system-based approach, I explored my client organization's critical aspects for strategic success to include (a) leadership, (b) strategies, (c) customers, (d) measurement, analysis, and knowledge (e) workforce (f) operations and (g) results.



## Section 2: The Project

Section 2 includes the purpose statement, the role of the researcher, the participants, research method and design, population and sampling, and an account of the actions I took to ensure ethical protections during the study to include institutional review board administration approval. I explain my data collection instruments, data collection technique, data organization techniques, data analysis, and the steps I took to ensure the reliability and validity of data. I justify my selection of qualitative research methodology and case study design to explore retention strategies that nonprofit leaders can use to reduce voluntary employee turnover.

### **Purpose Statement**

The long-term success and survival of any organization depend on the work and retention of a committed workforce (Das & Baruah, 2013). The costs associated with employee turnover, such as recruiting, selecting, and retaining successors for departed workforce members exceed 100% of the annual compensation of vacant positions (Bryant & Allen, 2013). The general business problem is some business leaders lack strategies for retaining their workforce. The specific business problem is that some leaders of nonprofit organizations lack strategies to retain their workforce.

### **Role of the Researcher**

Researchers are the main instrument for collecting data in a qualitative field-based study and affect the quality of the research (Denzin, 2014). During the data collection process, qualitative researchers impact every stage of a study by designing the study, conducting interviews, transcribing, analyzing and verifying data, and reporting themes

and concepts (Sanjari, Bahramnezhad, Fomani, Shoghi, & Cheraghi, 2014). Throughout this research study, I served as the primary data collection instrument and performed a central role in generating and interpreting data in this qualitative single-case study.

Yin (2016) noted that researchers must acknowledge their own lens and consider how they may influence research choices throughout a study. I considered my own background in human resources management as I conducted my research. I have previously worked as a human resources specialist and gained an understanding of workforce policy and practices that relate to employee hiring and retention. Therefore, I am familiar with some of the human resources characteristics that the participants mentioned during the interview process. During this research study, I acknowledged the potential for this bias and used techniques to ensure I did not adversely alter how I collected and analyzed data. To avoid bias, researchers pose questions about data, constantly make comparisons, develop rival explanations, and remain alert to negative instances (Yin, 2016). I deployed these techniques during my research.

I conducted my study within the ethical research requirements of the Belmont Report (National Commission for the Protection of Human Subjects of Biomedical and Behavioral Research, 1979). Specifically, I followed the core principles for ethical research standards involving human subjects and adhered to the Belmont Report mandate: respect for persons, beneficence, and justice (National Commission for the Protection of Human Subjects of Biomedical and Behavioral Research, 1979).

Researchers produce ethical research partly by ensuring anonymity, confidentiality, and informed consent, and considering how the research may affect the participants (Sanjari

et al., 2014). A researcher's strong ethical standards may serve as a means to avoid personal bias (Yin, 2016). For instance, researchers must consider their own intuitions, rules, principles, theory, values, decision making, and actions in particular situations throughout the process of a research study (Yin, 2016).

Throughout my study, I maintained an awareness of my personal perspective on human resources and my background in the field. I did not allow my experience with employee turnover and retention to affect my systematic processes for data collection and analysis. I acknowledged my motivation as a human resources practitioner to develop effective organizational policies and strategies that affect the workforce. However, I remained vigilant to ensure that I did not let this motivation influence the research process and degrade the integrity of this study by introducing researcher bias. In addition, I always prepared for the interviews in advance, remained neutral, and never altered the essence of the data collected. A researcher's preparedness, rigor of data collection, and awareness of a held perspective can influence the quality of research and bias management (Yin, 2016). During the data collection process, I adhered to the interview protocol and maintained an ethical researcher role.

I obtained and analyzed data that were provided by the study's participants and did not attempt to alter the data. It is important to design, conduct, and report research findings in a transparent way with honesty and without deviation from the truth (Simundic, 2013). The interview protocol helped maintain organization before and during interviews. The reliability of interview protocols as a researcher conducts qualitative research contributes to the quality of data obtained during the interview

process (Castillo-Montoya, 2016). A well-structured interview protocol assists qualitative researchers in the development of an instrument appropriate for their study's participants and alignment to the research subject matter (Jones, Torres, & Arminio, 2014).

### **Participants**

I identified and selected three senior leaders from my client organization assigned to me by Walden administration and faculty according to the protocols of Walden's DBA Consulting Capstone. The eligibility criteria for participation in this study is senior leaders over the age of 18 who have a minimum 2 years of managerial experience working in the nonprofit organization. I spoke with the senior leaders of my client organization on two occasions to determine which of the organization's leaders met the participation criteria and had a position of responsibility with direct influence on workforce policy and engagement. Also, I reviewed my client organization's organizational chart that lists positions and names of current occupants to ensure I selected participants that met the participation criteria. All three of the selected senior leaders met the eligibility criteria for this study. The selection of three participants allowed me to triangulate interview data between the organization's documents and each participant after I transcribed their interviews. This process allowed me to assess the validity and reliability of data and ensure the data was rich and thick (Carter, Bryant-Lukosius, DiCenso, Blythe, & Nevill, 2014; Anney, 2014; Dibley, 2011). I sent the participants of this study a study participation consent form that detailed the guidelines for participation. I established a working relationship with participants by sending them

the consent form via e-mail and established further communication via phone, e-mail, and subsequent qualitative interviewing. I also made use of member checking during the study by sharing findings and draft material with participants. Member checking data enhanced the working relationship and connection I had with the participants and allowed them to improve the accuracy of collected data (Andraski, Chandler, Powell, Humes, & Wakefield, 2014; Harvey, 2015; Yilmaz, K. (2013).

## **Research Method and Design**

### **Research Method**

The focus of this study was to collect and analyze data and information that pertained to my client organization's key work processes and results. Qualitative research is the chosen method to study the hiring and retention of employees within the nonprofit organization. This method offers a rich and varied set of strategies that help researchers investigate questions about social and psychological life (Bernard, 2013). The qualitative method also provides researchers the ability to assess descriptions and direct explanations from people who experience a problem or phenomenon (Anyan, 2013). Further, the qualitative method enables deeper contextual investigation into behaviors, beliefs, social norms, and other factors that influence social context and phenomena (Antwi & Hamza, 2015). Qualitative researchers make use of natural settings to collect data where participants experience the phenomenon under study (Brinkmann & Kvale, 2015; Yin, 2014).

Thus, researchers use the qualitative method to conduct research with face-to-face interaction within the participants' environment, which enhances analysis of

organizational processes (Percy, Kostere, & Kostere, 2015). Also, qualitative research offers participants the opportunity to communicate their held perceptions of a phenomenon associated with a study (Barbour, 2014; Bender & Hill, 2015). For instance, qualitative interviewing produces a retrospective and real-time account of people experiencing the phenomenon that is of theoretical interest. The use of multiple data sources justifies the choice of the qualitative method in this context to explore from an in-depth perspective (Bender & Hill, 2015; Jamshed, 2014). Quantitative research entails data analysis and a test of objective theories by examining the link between multiple variables that conclude with a measure or quantifiable data (Norris, Plonsky, Ross, & Schoonen, 2015). Qualitative interviewing was an appropriate approach to collect the meanings and interpretations of the participants' points of view, gain insight, and address the problem that some leaders of nonprofit organizations lack strategies to retain their workforce.

The quantitative method was not suitable for this study because I did not examine hypotheses or compare variables (Bettis, Gambardella, Helfat, & Mitchell, 2014; Vasquez, 2014; Yilmaz, 2013). Researchers who utilize the mixed method combine the methodologies of qualitative and quantitative research to address more complex topics and obtain a more comprehensive finding (Venkatesh, Brown, & Bala, 2013; Yin, 2016). Researchers use the mixed method research approach to produce information about the quantitative and qualitative aspects of a study that highlight the strengths of both methods (Boeije, van Wesel, & Slagt, 2014). I did not test hypotheses or seek to assess a degree of cause and effect between variables (Bernard, 2013; Frels & Onwuegbuzie, 2013; Yin,

2016). The mixed method was not suitable for this study. I explored business processes. Therefore, the qualitative research method was appropriate to collect data with effective collection methods to achieve the intent of this research study.

### **Research Design**

The purpose of this qualitative single-case study was to explore strategies leaders of nonprofit organizations use to retain their workforce. Case study design involves the study of a phenomenon within a real-life context or setting that allows a researcher to conduct a strategy of inquiry within a bounded system of time and place (Lewis, 2015; Raeburn, Schmied, Hungerford, & Cleary, 2015; Yin, 2014). Yin (2014) stated that research design is the logical sequence that connects the empirical data to a study's initial research questions and subsequent conclusions. The single-case study design allows a researcher to investigate the phenomenon in depth to provide a rich and robust description and understanding of the case (De Massis & Kotlar, 2014; Siggelkow, 2007). Ritchie and Lewis (2014) stated that research questions drive the appropriateness or foundation of research design.

Case study research is an effective design for researchers who seek to ask *how* questions during data collection (Yin, 2014). Stake (1995) contended that case study design influences researchers to focus attention on what they may learn from a single case study. Siggelkow (2007) argues that a single case analysis can be a very powerful example and may fill in the gaps within existing theories. Alternative design options for qualitative researchers include phenomenological design and ethnographic design. Researchers use phenomenology research to zero in on individual experiences associated

with a phenomenon and give a description of the universal essence or nature of the phenomenon (van Manen, 2014; Yin, 2014).

Although phenomenology research offers participants the opportunity to share experiences, it does not focus on an in-depth description or analysis of a case.

Phenomenological researchers also attend to the political, historical, and sociocultural contexts of unique events or phenomenon (Yin, 2016). In addition, phenomenological researchers do not use secondary data or documentation to triangulate the validity of collected data (Denzin & Lincoln, 2011; Robertson & Thomson, 2014; Yin, 2014).

Phenomenology was not the appropriate research design for this study because I did not explore participants' shared experiences.

Ethnographers use close contact with participants to critique participants' social relationships to learn their experiences and perspectives within their natural environment (Eika, Dale, Espnes, & Hvalvik, 2015). Ethnographers conduct their inquiry by immersing into the day-to-day activities of participants during an extended period (Cruz & Higgin bottom, 2013). They assess the culture sharing nature of a group by interpreting the collective patterns of values, behaviors, beliefs, and language of the group (Small, Maher, & Kerr, 2014; Van Maanen, 2015). Specifically, an ethnographer focuses on the common patterns that form as the group interacts over time (Murthy, 2013). Ethnographic research design was not appropriate for this study.

Researchers reach data saturation when they obtain enough information to replicate their study (Fusch & Ness, 2015; Park & Park, 2016). To achieve data saturation during this exploratory single case study, I interviewed three managerial



directors of the nonprofit one at a time, took extensive notes, reviewed nonprofit archival documentation, and repeated the process until data saturation. The use of multiple data sources supported the process of data triangulation and subsequent data saturation (Fusch & Ness, 2015; Yousefi & Shahgholian, 2015).

### **Population and Sampling**

The population for this study was nonprofit leaders in one Washington, DC nonprofit who have knowledge of nonprofit turnover. I chose a sample size of three participants because each participant can offer critical data that are relevant to employee turnover and retention. Fusch and Ness (2015) stated that a sample size should allow for the best opportunity for a researcher to reach data saturation. Dibley (2011) contended that researchers evaluate data for how rich and thick it concerns a phenomenon. Thus, a researcher can reach data saturation because of the depth of the data rather than the size of the sample (Newington & Metcalfe, 2014; Burmeister & Aitken, 2012). Therefore, the sample size for this study was appropriate.

I selected participants that meet the eligibility requirements to participate in this study. These requirements included: a managerial leader within the nonprofit with historical knowledge of the nonprofit's retention strategies, and over the age of 18, and recommended by other senior leaders. Researchers should select participants that possess knowledge and experience with the phenomenon and who are able to provide generalizable and detailed data (Apostolopoulos & Liargovas, 2016; Palinksa et al., 2013). I used purposeful criterion sampling for this study because it aligned with my intent to conduct a qualitative examination of a case representative of the study's central

research question. Yin (2016) explained that a researcher's goal of using purposive sampling is to have participants that will yield the most critical, relevant, and plentiful data on the topic of a study. The use of purposive sampling will enable a researcher to ensure categories of a case are represented in the final sample of a study (Moss, Gibson, & Dollarhide, 2014; Robinson, 2014). Suen, Huang, and Lee (2014) contended that members of the population are not identical, and the sample size is determined by data saturation.

To achieve data saturation, I interviewed the nonprofit leaders and reviewed organizational documentation. I had multiple contacts with the study's participants via interviews over an extended time to ensure no new data emerged. In qualitative studies, multiple contacts with participants and a sufficient number of participants is needed to ensure data saturation as researchers determine if any new themes become evident (Calman, Brunton, & Molassiotis, 2013; Bernard, 2013). I used the nonprofit's documentation to conduct methodological triangulation to obtain information richness and ensure the credibility of the information. Researchers add strength to their study's design when they use triangulation by analyzing multiple sources of evidence (Yin, 2016; Houghton, Casey, Shaw, & Murphy, 2013; Walsh, 2013).

### **Ethical Research**

I received IRB approval at Walden University before I conducted this study. My Walden IRB approval number for this study is 07-22-16-0596419. Once I identified the participants for my study, I called my participants to explain the scope and purpose of my study. I explained to my participants that they would take part in audio recorded

telephone interviews. I informed each participant that participation in the study is voluntary and that they have the option to withdraw at any time during the study. The consent form is an agreement between the researcher and a study's participants (Check, Wolf, Dame, & Beskow, 2014). Researchers use consent forms to ensure participants have the information to make an informed decision about their participation (Check et al., 2014).

Yin (2016) stated that participants should understand the purpose of a study, what the researchers want to accomplish with the study, and how the researcher will present the final study. When I received verbal confirmation for their participation, I sent each participant a consent confirmation email that detailed interview procedures, voluntary nature of the study, risks and benefits of participation, privacy characteristics, and contact information for the Walden University representative who could discuss participants' rights for the study. Each participant was required to respond to the email with, "I consent," if they agreed to provide data for the study. Participants voluntarily agreed to offer data for this study. Therefore, participants could withdraw from the study at any time.

I informed each participant of the procedures to withdraw from the study. Participants could withdraw by informing me by phone or email. I maintain the integrity of the data participants provided. I kept transcribed data confidential and did not share the data with other participants. During this study, participants did not receive any form of compensation. The nonprofit and the employees that participated in this study will not be identified. I will use only the pseudonym "X Company" or "the nonprofit" in

reference to the organization and to protect the identity of the study's participants, I labeled the participants, Participant 1, Participant 2 and Participant 3 to ensure their privacy. I explained to each participant that transcripts from interviews would be confidential and I explained that they could review transcripts of each interview at any time for accuracy. The transcripts will be securely stored in a password protected safe after the study. After 5 years, I will erase all data collected for this study to protect the confidentiality of this study's participants.

### **Data Collection Instruments**

I was the primary data collection instrument for this study. In qualitative research, the researcher acts as the research instrument (Yin, 2016). In this role, a researcher will design the study, develop interview questions, complete transcription, analysis, verification of data and report the data (Sanjari et al., 2014). Each interview consisted of the Baldrige Framework questions and the study's five open-ended research questions. I used the Baldrige Framework to gain a holistic understanding of the nonprofit's operations and performance. The Baldrige Framework is a tool to assess the systemic approach of an organization and gain insight on the important components that leaders use to achieve ongoing organizational success (Baldrige Framework, 2017).

I followed the interview protocol for every semistructured interview with each participant. An interview protocol is a valuable instrument of inquiry because the use of a protocol helps a researcher ask questions for specific information that relates to the focus of a study (Patton, 2015). Every interview was audio recorded. When qualitative researchers conduct interviews, they can obtain retrospective and real-time accounts from

participants who are experiencing a phenomenon under study (Carduff, Murray, & Kendall, 2015). Interview questions help researchers gain an understanding of the central research questions for a study (Maxwell, 2013). Researchers use interview technique and protocol to conduct an indepth inquiry for every participant (Irvine, Drew, & Sainsbury, 2013).

The protocol includes the process of selecting participants and other data sources, data collection procedures and data analysis. I conducted seven interviews with each participant. The average time for each interview was 45 minutes. After transcription and review of data collected during interviews, I later conducted member checking with each participant to verify the data. Researchers use member checking to address data verification by providing participants with the opportunity to engage interpreted data after their semistructured interview (Birt, Scott, Cavers, Campbell, & Walter, 2016). Member checking is a quality control tool because researchers use the process to check the credibility of the information provided by verifying data with participants (Marshall & Rossman, 2016).

Researchers should share transcripts and findings with their participants to get their feedback and ensure the validity of the information (Yin, 2016). To address the study's central research question, I used the data from interviews and analysis of documents to obtain rich information. Throughout the study, I assessed the quality and validity of the information collected during interviews and documentation the organization leaders provided by cross-referencing the information. Qualitative researchers use different methods and data to produce a more comprehensive set of

findings (Noble & Smith, 2015; Fusch & Ness, 2015; Anyan, 2013). Edwards and Holland (2013) and Houghton et al. (2013) noted that qualitative researchers have an objective to remain neutral and obtain comparable information from a large number of participants. Therefore, I maintained the integrity of my study by following the interview protocol and asking each participant identical questions. The interview protocol and interview questions are in Appendix A.

### **Data Collection Technique**

The data collection technique I used for this study was semistructured interviews via telephone with an interview protocol and analysis of relevant organization documents. I used semistructured interviews and interview protocol to gain insight into voluntary employee turnover in the nonprofit sector by allowing each participant the freedom to provide valuable data. I used an interview protocol to help ensure that my study is structured and replicable for further research (see Appendix A). An interview protocol is a tool that researchers commonly use to ensure consistency with structured interviews (Doody & Noonan, 2013). For this study, I used open-ended questions to enhance my understanding of the research problem. When researchers use open-ended questions during semistructured interviews, they allow participants to answer a series of preset questions to provide indepth information about explored topics (Yin, 2016; Seidman, 2015; Jamshed, 2014). I explained to the participants the procedural process of the interviews, such as consent for participation in the study, the question topics, and the scope of my research.

Fakis, Hilliam, Stoneley, and Townend (2013) advocated the use of interview protocol as a procedural script and guide that researchers use to conduct interviews. I ensured participants signed the consent form acknowledging their consent to participate in the study and consent to the audio recording of each interview. Before each telephone interview, I sent an e-mail to participants to confirm they understood their rights as participants and the date and time of the interview. I used my cell phone and a tape recorder for each interview. On the day of each interview, I prepared for the interview and transcription of the data by checking the phone and recording device for function and volume. Also, I reviewed the interview questions before each interview for preparation. I used organizational documentation to obtain an understanding of the phenomenon further.

Researchers use documents as a data collection technique to get important contextual information to complement their research (Yin, 2016) For my study, I used organizational strategic plans that my client leaders developed and the results of employee surveys that my client leaders administered. Researchers can use organizational documents to get an understanding of organizational history and context (Bryman & Bell, 2016). By using semistructured interviews as a data-collection technique, I was able to discuss the phenomenon at length with each participant. Pietkiewicz and Smith (2014) noted that researchers use semistructured interviews to engage participants in real-time dialogue. I established a conversational mode with participants to help them communicate their experiences with the phenomenon. However, I was not able to see and note nonverbal communication. Without visual

access to participants during telephone interviews, researchers do not gain a substantial amount of nonverbal visual data (Novick, 2008). An advantage of using organizational documents was that I cross-referenced organizational data with data offered verbally by each participant. Cross-referencing data is an effective strategy to ensure data saturation, the validity of data, and trustworthiness of data (Houghton et al., 2013).

After I transcribed each interview verbatim, I summarized participants' responses to all questions in each section. Then I conducted member checking, a process Birt, Scott, Cavers, Campbell, and Walter (2016) described as a technique that researchers use to explore the interpretation of data and credibility of results by allowing participants to check for accuracy of data provided. I used member checking to interpret the data for accuracy and credibility. The use of member checking gave me the opportunity to confirm participants' responses and allow participants the opportunity to engage with me during data interpretation. Member checking is a process to reach data saturation, authenticate the data, and ensure the data reflects the participants' experiences (Marshall & Rossman, 2016; Houghton et al., 2013).

### **Data Organization Techniques**

Yin (2016) noted the benefits researchers gain by quickly searching and accessing data during data analysis while they maintain orderly data. A researcher can create a system for quick access to data through an effective organizing effort (Yin, 2016). In this study, I kept track of data by organizing an electronic folders' database on my computer. I named the files based on the topic and relevance of the data. Researchers can maintain confidentiality and anonymity by assigning generic codes to participants and textual data



(Gibson, Benson, & Brand, 2013). I masked the name of each participant and employee from staff survey results with a code to keep a confidential record of who provided the data (e.g., Participant 1, Participant 2).

I transcribed interview data to Microsoft Word documents and labeled the documents with the participant's code, date of the interview, and topic. I created an electronic folder to file and organize the organizational documentation. I maintained a commitment to the organization's confidentiality and only presented data relevant to the study. Taylor and Land (2014) noted the importance of limiting data to pertinent organizational content. I limited data collection to pertinent organizational content only and did not access anecdotal information and performance outcomes that were not relative to this study. I transferred the data to a flash drive and stored the electronic files on a password-protected flash drive. All confidential data and documentation will be stored securely in a password-protected vault in my home office for 5 years.

### **Data Analysis**

Houghton, Murphy, Shaw, and Casey (2015) noted the importance for qualitative researchers of establishing a systematic approach to handling and analyzing large data sets of multiple sources of evidence. For this case study, I used methodological triangulation to conduct data analysis of interviews and organizational documentation. Methodological triangulation is a process that researchers use to develop a comprehension of data collected (Heale & Forbes, 2013). I used methodological triangulation to conduct data analysis because Yin (2016) contended that researchers use

the method to strengthen the credibility of a study by converging multiple sources of data that may lead to the same finding.

I listened to each audio recording of the interviews and carefully noted each response to match the data to the organizational documentation. I transcribed the interviews and reviewed the data. Next, I completed thorough member checking for participants' validation. To confirm validation of the data, I contacted each participant by telephone and by exchange of e-mails to discuss interview transcripts. I organized the data into categories by pertinent aspects relevant to the data and the research question that I could later use to make sense and explain the aspect of the data. Thereafter, I conducted coding of data, a process Saldana (2016) explained labeling segmented data by descriptive words and then grouping the data. I carefully read the interview transcripts and assigned codes based on substantive factors, emotions, values, methodological elements, and other factors relevant to the research question as explained by Gale, Heath, Cameron, Rashid, Redwood (2013). I reviewed the assigned codes with each participant during the member-checking process. Using codes and themes can help researchers represent the meaning they infer from their original data (Charmaz, 2014). After I manually coded and identified recurring themes in the data,

I used the codes and themes to compare with codes and elements from Maslow's hierarchy of needs theory and scholarly literature on employee turnover and retention. Researchers offer a valid explanation of a phenomenon when they conduct data analysis by integrating past literature and patterns to produce credible and relevant study findings (Gale, Heath, Cameron, Rashid, & Redwood, 2013; Gläser & Laudel, 2013). I used the

2017-2018 Baldrige Performance Excellence Framework (2017) as a guide to collect data and identify critical factors that contribute to employee retention in nonprofit organizations. I applied Maslow's hierarchy of need theory and his notion that one's motivation is based on the drive to achieve a need to guide my research on employee retention strategies. I cross-referenced interview data, organizational documentation, the tenets of Maslow's hierarchy of needs theory and the Baldrige framework to analyze the data collected during my study to understand the components of effective retention strategies that organizational leaders may use to reduce employee turnover in nonprofit organizations.

### **Reliability and Validity**

#### **Reliability**

Qualitative researchers enhance the reliability of their study by justifying research strategies, explaining procedures and methods, and evaluating the process to assess dependability of their research (Yilmaz, 2013). I used an interview protocol during the interviews and asked the same interview questions to each participant to maintain consistency. Yin (2016) recommended that qualitative researchers use protocols to ensure trustworthiness of subsequent data and research findings. I reviewed the interview transcripts thoroughly after each interview and subsequently conducted member checking to allow each participant to confirm or refute my interpretation of the data. Harvey (2015) recommended member checking to enrich the dependability of research finding because member checking is a useful technique to explore the credibility of results (Birt et al., 2016; Fusch & Ness, 2015). I also reviewed organizational

documentation such as strategic plans and employee surveys to substantiate interview data and my research findings. I collected and reviewed data from the interviews and documents until I did not obtain new information.

Qualitative researchers can triangulate interview and document data to enhance the rigor of qualitative research and add breadth to a study and also gain a deeper understanding of a phenomenon (Yilmaz, 2013). Fusch and Ness (2015) stated that the use of triangulation would improve the reliability of results and a researcher's efforts to achieve data saturation. Qualitative researchers achieve data saturation when there is no new information to gain (Hancock, Amankwaa, Revell, & Mueller, 2016). I explained my data collection processes in detail to ensure my study is replicable. Leung (2015) noted that consistency is an important criterion for the reliability of qualitative research. Researchers should offer detailed instruction on their data collection processes and techniques so that future researchers can consistently replicate the study although data results may vary (Leung, 2015). To infuse trustworthiness into my study, I reported how I constructed my qualitative case-study, explained the decisions I made and detailed thoroughly the methods I used in relation to the central research question. According to Elo et al. (2014), qualitative researchers can ensure the reliability of their study by a process to establish the trustworthiness of their research.

### **Validity**

Yin (2016) stated that a study's validity entails a researcher's proper interpretation of data to achieve accurate conclusions to reflect characteristics associated with the phenomenon under study. I conducted member checking to ensure I transcribed

the interview data accurately and allowed participants to authenticate my interpretation of the data. Researchers enhance the credibility of their study when they allow participants to confirm the accuracy of a study's results (Yin, 2016; Check et al., 2014; Yilmaz, 2013). Noble and Smith (2015) explained that transferability refers to a researcher's assurance that findings can apply to other contexts and settings. In my study, I provided a meticulous description of my data analysis process and justification for selecting participants, and I explained the relevance of each decision based on the context of the research question. Houghton et al. (2013) noted the importance for researchers to offer thick descriptions of research context and methods to enhance the transferability of a study. Readers may be able to apply this study's findings to for-profit and nonprofit organizations to enhance retention strategies. Readers can also take from this study the importance to fuse employee and organizational needs to achieve performance goals. Confirmability is when a study's findings are based on a researcher's analysis of the collected data and examined thoroughly over a lengthy process to confirm data and clear and logical inferences (Yilmaz, 2013).

To ensure the confirmability of this study, I described my research process and outlined how I developed my study. Qualitative researchers should outline decisions throughout the research process to give a rationale for the methodology based on research context (Houghton et al., 2013). I also used member checking to validate the interview data to enhance the confirmability of my study. Sutton and Austin (2015) stated that confirmability is the extent that participants influence a study's findings without the impact of a researcher's perspective on the phenomenon. Data saturation is a critical

aspect of assessing a study's validity because data saturation is an indication of the adequacy and quality of data collected in support of a study (Fusch & Ness, 2015). I reached data saturation by transcribing interview data and triangulating the interview data with organizational documentation. I used methodological triangulation because a researcher can ensure data saturation by analyzing multiple data sources and confirm that the data are rich and in depth (Heesen, Bright, & Zucker, 2016; Agyemang & Carter, 2014; Gorissen, Bruggen, & Jochems, 2013).

### **Transition and Summary**

Section 2 encompassed the purpose of the study, the role of the researcher, research methodology, research design, and the criteria I used to select participants and sample size. The section also included steps to achieve ethical research, data collection methods, and techniques and a description of how I analyzed the data. Finally, the section contains the details on how I ensured the reliability and validity of the data. I opened Section 3 with X company's organizational profile. I subsequently provide a review of several organizational components to include: (a) leadership, (b) strategy, (c) customers, (d) measurement, analysis, and knowledge management, (e) workforce, (f) operations, and (g) results. I closed Section 3 with study finds, an executive summary of key themes, project summary and contributions and recommendations for future researchers.

### Section 3: Organizational Profile

X Company (pseudonym) is a nonprofit organization located in the Washington, DC, area. X Company's chief executive officer (CEO) founded the nonprofit in 2003 with the intent to strengthen the local community through volunteerism by connecting companies, nonprofits, and individuals to bolster community engagement and enhance the connection among all stakeholders. X Company leaders and staff strive to work with business, nonprofit, and volunteer partners to make a positive social impact on the communities in the Washington, DC, area. X Company is the sole organization in the region in which leaders and staff partner with business entities to inspire volunteerism, enhance the relationship between community stakeholders, businesses, and motivated people with the desire to build stronger communities. X Company leaders achieve their mission by helping businesses develop and implement strategic initiatives, programs, matching services, and training that benefit the community.

Over the last 13 years, X Company leaders and staff have served well over 100 businesses, supported 475 nonprofit organizations, referred over 190,000 volunteers, and matched 770 board members. X Company's senior leaders continuously strive to facilitate connections between volunteers and business entities to address various social issues and support the development of local communities.

#### **Key Factors Worksheet**

##### **Organizational Description**

X Company is a 501(c)(3) organization based in the Washington DC area. X Company leaders and staff have a unique and important role in connecting motivated and

civic-minded people and businesses with nonprofit and community organizations through meaningful leadership and volunteer opportunities. X Company leaders and staff recognize that strategically engaging expertise in the community is at the core of transformative social change. X Company's CEO created the nonprofit to facilitate volunteer connections to help ensure that stakeholders use time, talent, and experience to help address social issues and challenges and build strong and thriving communities.

**Organizational environment.** Review of key organizational characteristics.

**Product offerings.** X Company's program and service offerings include: (a) business advisory and consulting services, (b) board training, (c) board matching, (d) team volunteer project/days of services, (e) skilled volunteering, (f) civic leadership programs, (g) skill development for young professionals, (h) school and board partnerships, (i) online volunteer website, and (j) nonprofit advisory services and training. X Company leaders and staff provide business advisory and consulting services by advising companies on efforts to create corporate social responsibility plans that connect employees with meaningful volunteer and leadership opportunities. X Company leaders and staff also connect companies and business leaders with individual public schools through the organization's school partnership program. X Company leaders and staff use this program to address the needs of schools and the interest of business partners, which often leads to an advisory board or school-business partner relationship. Team volunteering projects are also a critical service that X Company leaders and staff members provide. The nonprofit's leaders and staff members organize, plan, and



implement a community service project for business groups that entails team volunteering for the betterment of the community.

Through civic programs, X Company leaders and staff train and match business professionals with other nonprofit boards based on need, individual skills, and interests of volunteering individuals. X Company leaders and staff also provide a civic leadership program that X Company leaders and staff use to develop young professionals' awareness and commitment to important issues that affect local communities. X Company leaders and staff use the program to inspire meaningful change and develop the necessary employees' skills via workshops, networking events, and volunteer opportunities that are similar to participants' interests. X Company leaders and staff use training sessions and events to allow volunteering individuals to enhance leadership skills, increase board engagement, build nonprofit capacity, and connect like-minded people through networking opportunities.

Volunteer connections is a beneficial service provided by X Company leaders and staff to boost volunteer engagement. The nonprofit's leaders and staff offer a community-based web portal that potential volunteers can use to connect with other volunteers and stay informed about a variety of service projects and other volunteer opportunities to support the local community and businesses. Additionally, X Company leaders and staff assist volunteers seeking opportunities to connect with volunteer opportunities. For example, X Company leaders and staff host events to facilitate volunteer connections by informing volunteers about volunteer opportunities.

Table 1

*X Company Programs, Services, and Competitive Status*

<b>Program/Service</b>	<b>Description</b>	<b>Overlapping or Competitive Efforts (2016)</b>
<b>Business Advisory and Consulting Services</b>	X Company leaders and staff advises companies on creating community engagement plans, developing an employee volunteer committee, etc.	To a small extent – <b>Association of Baltimore Area Grantmakers (ABAG)</b> . Large companies work with <i>national groups</i> that consult on Corporate Social Responsibility (CSR). Some <i>small consulting firms</i> locally. And some <i>PR and Marketing firm’s leaders</i> are starting to do work in this space.
<b>Board Training</b>	X Company leaders and staff provides board training workshops	<i>Washington DC Area Nonprofits</i> leaders host multiple board training events each year; <i>BoardSource</i> leaders and staff provides national web-based training and traveling consultants; <i>some business</i> leaders are providing board training for their employees; and a few colleges presidents have started to incorporate board training into their related coursework (i.e.: Nonprofit Institute at College of Southern Maryland.)
<b>Board Matching</b>	X Company leaders and staff matches professionals to nonprofit boards - both one-on-one and through a speed-matching event provided two times/year	There is not much competition here, but it is important to note that: <i>Associated Builders &amp; Contractors’</i> leaders <i>manage</i> a board connection program for African American candidates. The <i>Associated</i> leaders match Jewish leaders with their own agencies. <i>Howard County Leadership &amp; the Volunteer Center</i> leaders do web-based matching. Two PR firms do some board matching for their clients. Several <i>larger companies</i> manage some of their own board matches in addition to contracting with X Company
<b>Team Volunteer Projects /Days of Service</b>	X Company leaders and staff organizes volunteer projects for teams of employees or the whole company for a full day of service.	Event planning or other small <i>consulting firms</i> ; several <i>larger nonprofits</i> leaders can organize these days themselves; <i>United Way</i> ; <i>businesses</i> DIY; <i>Volunteering Untapped</i> - Potentially competition for young professionals seeking volunteer opportunities.
<b>Skilled Volunteering</b>	X Company leaders and staff lead skilled volunteer projects for Give program classmates and works to	Not much competition in this area, although, <i>Taproot Foundation</i> leaders do similar work with narrowly defined projects in DC with only a little movement in Baltimore. Some <i>businesses</i> are doing work on their own in

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	connect business professionals with nonprofits that have a specific, skilled, projects they need to be addressed. For example, finance, marketing, IT.	this space.	
			(table continues)

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<b>Program 1</b>	Civic leadership program for young professionals (age 25-35) - class of 40 participates in a year of programming - training, networking, volunteering.	<i>United Way</i> leaders manage an informal Emerging Leaders United (ELU) group with occasional learning and volunteer opportunities. ELU does not have a large membership. The <i>Associated leaders</i> also manage a young leaders group for the Jewish Community. <i>Leadership Howard County</i> has a young professionals group as well.
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<b>Program 2</b>	The Lead Initiative was created in collaboration with The Economic Alliance of Greater Baltimore (EAGB) in 2014 to help develop and connect a larger group of young professionals. The initiative includes a series of skills development training, networking events, and volunteer connection and engagement events.	<i>ELU, The Associated, and Network Under 40</i> leaders provide networking for young professional. <i>CityFam</i> leaders provide networking and service opportunities for young professionals, <i>Volunteering Untapped</i> leaders provide monthly volunteer experiences and networking. <b>The Young Nonprofit Professionals Network (YNPN)</b> leaders of <i>Baltimore</i> provide networking & professional development opportunities for nonprofit professionals. <i>Baltimore Net Impact</i> leaders build capacity and networks for those committed to using their professional skills to make a positive change in Baltimore.
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<b>School Partnerships and Boards Program</b>	X Company leaders and staff develop partnerships between a business/business leader and a Baltimore City Public School in which they can provide business expertise. In 2016, X Company leaders launched Board which is creating advisory boards for schools.
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<b>Volunteer Website</b>	X Company leaders and staff use the volunteer matching website and call center to help individuals find volunteer opportunities. Nonprofit leaders post their needs online with an average of 300+ opportunities.	<b>Volunteer Match:</b> Schools/universities have own referral programs. National services such as <i>Volunteermatch.com</i> and have similar functions. Volunteer website is the sole Baltimore City-focused search engine, but several <i>counties</i> have their own.
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*(table continues)*

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<b>Nonprofit Advisory Services &amp; Training</b>	X Company leaders and staff advise nonprofit leaders on creating/enhancing volunteer programs, developing "Jr. boards" using skilled volunteers, & working w/ businesses. X Company leaders and staff also provide training and roundtables to support nonprofit staff on effective volunteer recruitment and engagement.	<b>Washington, DC area Nonprofits</b> leaders provide several types of training and consulting service to strengthen nonprofit capacity. <b>Maryland Council of Directors of Volunteer Services (MCDVS)</b> and <b>Governor's Office on Service and Volunteerism (GOSV)</b> sponsor training and conferences that focus on volunteer management. Some <b>foundations and businesses</b> leaders have also started doing work in this space.
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***Mission, vision, and values.*** X Company's leaders and staff have a mission to inspire volunteerism and connect motivated people and businesses to nonprofit organizations to develop stronger communities. X Company leaders and staff strive to help build a stronger community through business engagement, civic leadership, and volunteer connections. X Company's CEO envisions a future in which all individuals and businesses in the Washington, DC, area engage and invest in building strong and thriving communities. X Company leaders and staff value all efforts to make a difference in the community by giving to the community and providing quality services with high standards to benefit clients, the client's workplace, and stakeholders.

Table 2

*X Company Mission, Vision, and Values*

Core Competency
Community engagement. Social responsibility. Relationship building and value creation.
Mission and Vision
X Company exists to help build a stronger community through business engagement, civic leadership, and volunteer connections. X Company leaders and staff envision a future in which all individuals and businesses in Washington, D.C. are engaged and investing in building strong and thriving communities.
Values
Excellence. Respect. Collaboration. Spirit.

**Workforce profile.** X Company's CEO employs 10 people who facilitate the organization's strategy, operations, growth, business development, external relations, and programs. The CEO distributes functions and responsibility to positions that consist of operations administration, program management, program development, business management, account management, and marketing. X Company's core competencies include understanding and maneuvering within the business community, volunteer interests, and the nonprofit sector. X Company leaders and staff can connect these core competencies and factors to produce a significant impact in the community. The organization's leaders and staff strive to manage connections and develop a stronger

relationship with stakeholders to further enable the leaders' and staff members abilities to create new and lasting connections.

Table 3

*Workforce Profile*

Educational Requirements		
Board Members	23	100% met
CEO	1	100% met
Director	1	100% met
Director	1	100% met
Director	1	100% met
Associate Director	1	100% met
Program Coordinator	1	100% met
Full-time Staff Members		
Volunteer and Events Coordinator	1	
Senior Manager, Business Engagement	1	
Manager, Office Administration	1	Bachelor's Degree
Corporate Service Program Manager	1	
Manager, Volunteer & Nonprofit engagement	1	
Committee Members	16	100% met

A baccalaureate degree is an employment requirement; some employees have a graduate level degree. Work experiences are a key driver for work duties and functions,

and they are valued by senior level management. The workforce composition reflects various backgrounds and life experiences that the workforce can use to facilitate critical thinking and creativity to achieve X Company's mission. Workforce members are passionate about volunteerism and united through community involvement and commitment to make a positive impact. X Company operates with a senior level leadership team that consists of the CEO who reports to a 25-member board of directors. Under the CEO, three managerial directors execute strategy, operations, business development, programs, and external relations. X Company has no organized bargaining units nor specialized health and safety requirements beyond the requirements associated with the Americans with Disabilities Act or the requirements associated with Occupational Safety and Health Administration guidelines.

*Assets.* X Company leaders and staff conduct operations in a warehouse that the CEO converted to an open-space office building. The CEO and directors have individual offices and the rest of the workforce have cubicle workstations. For meetings and other group gatherings, X Company leaders and staff utilize a conference room located in the office. Key technologies include computers equipped with Microsoft office products such as Microsoft Word, Excel, PowerPoint, and Outlook, which the employees use in their daily office operations. Staff members also rely on cellphones to maintain a relationship with clients and partners. X Company leaders and staff also utilize a database to track clients and partner interactions.

*Regulatory requirements.* X Company is licensed in the Washington, DC, area as a tax-exempt organization. X Company's CEO must disclose financial information

and adhere to tax requirements typical of all 501(c)(3) organizations under the Internal Revenue Code. Board members are required to avoid financially linked conflicts of interest that would occur while serving as board members. Additionally, X Company CEO is required to provide an annual report on clients, program effectiveness, and what the organization's workforce has accomplished. X Company's leaders and staff must abide by written policies that include bylaws and principles. X Company leaders and staff also audit financial records to ensure compliance with federal, local, and state laws. An external certified public accountant also conducts an audit of X Company's financial and operational records.

**Organizational relationships.** Review of organizational structure and stakeholders.

**Organizational structure.** X Company is a 501(c)(3) nonprofit organization. Organizational governance extends from the organization's board of directors to the CEO and individual directors. The board members provide organizational oversight by approving the annual budget and strategic plans and ensuring that X Company leaders and staff are fiscally responsible and focused on the mission. The CEO conducts quarterly meetings with the board to provide updates on X Company finances and updates on programs and organizational goals. Additionally, the CEO serves as the key ambassador of the organization to the community. The three directors focus on the programs and key services that X Company workforce provides. Directors manage teams and daily work and align the work to the organization's strategic plan based on different priority areas. The directors report to the CEO to provide status on their individual focus



areas. X Company's CEO also established an associate director position to have an organizational senior level leader focus on the scope of organizational work without the managerial requirements of other directors. X Company CEO tasks the associate director to focus on the leading strategic priority areas and special projects for X Company's future.

***Customers and stakeholders.*** X Company's main customers and stakeholders are businesses, nonprofits, schools, individuals, and the community. The organization's workforce also collaborates with the local state government, national and local entities, such as associations and advisory organizations. X Company leaders and staff aim to work with employers that maintain a workforce of 50 to 100 employees and have an adequate budget to commit to corporate social responsibility and make a significant impact. X Company's business partners seek to initiate an effort to increase volunteerism within their company and make financial contributions to social matters. X Company leaders and staff also work with other nonprofit organizations to find individuals that may have interest in volunteerism.

Volunteers connect with X Company to find volunteer opportunities that align with their individual interests. X Company's leaders and staff's effective communication and selling spearheads X Company's organizational efforts to promote services and beneficial outcomes that X Company's workforce can offer to each of their customers and stakeholders. This aspect of operations is essential to X Company's success.

***Suppliers and partners.*** X Company workforce works with like-minded business professionals, organization leaders, and association leaders to strengthen nonprofit and

business corporate social responsibility efforts and provides benefits to both the community and partners. X Company's various partners such as the leaders of the local Chamber of Commerce expand outreach and access to potential donators and sources of volunteers to help achieve X Company's mission. X Company leaders maintain open two-way communication with partners and stakeholders through regular phone calls and meetings. These key partners and stakeholders serve as a source of innovative inspiration by informing X Company leaders and staff on trends, sector changes, and valuable stakeholder feedback.

X Company leaders closely analyze the information and sector changes to refine services and augment programs to address pressing needs in the community. X Company leaders also collaborate with accounting firms, law firms, technology firms, and other professional service firms to help develop effective corporate social responsibility plans and help their workforce increase their volunteering efforts. X Company's leaders closely manage the relationship with partners and stakeholders to seek a beneficial outcome for the community and all supporting stakeholders.

Table 4

*Key Customers, Stakeholders, Suppliers, and Partner Requirements*

Key Customers	Key Requirements	Alignment
Businesses	Consulting services to help businesses leaders define and execute community involvement strategies to ensure maximum impact for the Company.	X Company leaders and staff review key customer requirements as part of the strategic planning process. X Company leaders and staff

Nonprofits	Facilitate the connection among volunteers, business professionals, and nonprofit organizations and provide support to increase capacity and productivity	administer surveys and review the results. X Company's use survey data to develop X Company's mission, vision, value and strategic plans and performance metrics.
Individual volunteers	Help volunteers find opportunities to help improve local communities. Offer recruiting, developing, and organizing community and business volunteers	
<i>(table continues)</i>		
Key Stakeholders	Key Requirements	Alignment
Board of Directors	Strategic plans, accountability, budget development, adherence to X Company's mission, guiding principles, bylaws and policies and procedures	
Workforce	Supportive leaders, safe working conditions, and environment, talents, abilities, and input encouraged by senior leaders	X Company leaders analyze key stakeholder requirements and ensure they consider these requirements in strategic plans
Community	Commitment to community issues where X Company's workforce involvement can be a critical factor in success.	
Partners and Collaborators	Ethical and transparent operations and thorough reporting.	
Key Strategic Partners	Key Requirements	Alignment
Downtown Partnership, Economic Alliance, City Schools, The LEADERship, The Family League, Association of Baltimore Area Grantmakers, Local Chamber of Commerce	Provide businesses with resources and support to effectively develop engagement and volunteer strategies to meet business goals. Make targeted, meaningful connections between businesses and nonprofits and create opportunities for motivated individuals to connect to inspiring causes. Foster powerful results for businesses, volunteers, nonprofit organizations, and the community.	Each partner and stakeholder aligns with X Company's strategic and programmatic goals and priorities by helping the organization's leaders and staff achieve their mission to build a stronger community.
Key Community Stakeholders United Way, Hands on Network, Young Nonprofit Professional Network, Volunteering Untapped, Local Nonprofits		

## Organizational Situation

**Competitive environment.** Review of competitive position, changes and data.

***Competitive position.*** X Company leaders and staff leverage the time and talent of business professionals and deploy volunteers to the local community to make a positive social impact; such services are unique to X Company. X Company leaders target potential partner organizations that have 50 or more employees. In the Washington, DC, area there are 2,500 organizations that fit X Company's target partnership criteria, which is adequate for potential growth. X Company leaders and staff seek opportunities to increase fees for service, government grants, foundation donations, and individual donations and fees. Although X Company does not have a direct competitor, the organization's leaders and staff seek funds and resources just like most nonprofit organizations workforce. United Way is an indirect competitor because the organization has similar mission tenets such as to help set up businesses' workforces with volunteer days of service. Volunteer centers' leaders and employees offer similar services that might appeal to the same volunteers X Company leaders and staff members seek to attract. In other cases, volunteers conduct their social impact without the help of an organization such as X Company.

***Competitiveness changes.*** Federal and state political changes often affect X Company's availability of government funding. This change is often reflective of the priority elected official place on social responsibility efforts. The fluctuation of funding and stakeholders' high demand for volunteers is a strategic challenge for X Company's leaders and staff who must continuously offer services and meet expectations. In addition, with rapid technological change, volunteers find opportunities more easily, which may not lead to a connection with X Company. As a result, X Company leaders

and staff must constantly seek technological solutions to refine and enhance their efforts to boost X Company's brand awareness.

As corporate social responsibility initiatives become the status quo, business social responsibility engagement may increase, which could limit the connection X Company has with key stakeholders. Demographic changes in the population will also alter the demand for X Company's services, incoming donations, and customer profile. X Company leaders must constantly account for technological, governmental, political, economic, demographic, and awareness changes to remain relevant and promote the need for volunteerism and corporate citizenship for community involvement.

***Comparative data.*** X Company's key sources of comparative and competitive data within the nonprofit sector are reports from national nonprofits such as United Way and Tap Root, state and national associations, foundations, consultants, research studies, and surveys. X Company leaders also rely on external business data such as number of employees, retention rates, diversity, and moral assessments. X Company leaders analyze the data of organizations that have corporate social responsibility programs, individual volunteerism, engagement, and other factors that may be relative to X Company's mission. X Company leaders and staff use comparative and competitive data to refine services and enhance the organization's connection with strategic stakeholders. Businesses leaders are not always forthcoming and open to sharing internal information; this lack of information can hamper X Company leaders' and staff efforts to enhance services that are responsive to business leaders' needs. Also, many organizations leaders require a membership fee to gain access to valuable information relative to X Company's

key strategic mission. Consequently, the membership fees pose a constant challenge for X Company's leaders and staff to acquire data.

**Strategic context.** Review of strategic challenges and objectives.

Table 5

*Key Strategic Focus Area, Advantages, and Key Strategic Challenges*

Strategic Focus Area	Key Strategic Challenges
Branding and Marketing	X Company leaders must build the nonprofit's brand to boost business community engagement and enhance recognition of X Company's services. Lack of strong brand awareness may erode the organization's current position over time and X Company will become irrelevant. Value proposition not always clear.
Innovation	X Company leaders must develop, enhance, and deliver innovative, high impact programs and services. The nonprofit's leaders must develop an integrated system to improve the process of onboarding new members to service delivery and continuous engagement. Quick access to valuable data and internal reporting is another challenge that X Company leaders face.
Building a strong operational foundation	X Company leaders must invest in the workforce to improve workforce development and decrease turnover. X Company is a small organization with a limited budget. Thus, limited financial resources pose a challenge for X Company leaders to invest in operational capabilities. X Company leaders struggle to scale operations and key systems not in place.

Program funding and stakeholders' demands	X Company leaders deal with a fluctuation of available funding and stakeholders' demands. <i>(table continues)</i>
Area	Key Strategic Advantages
Social Responsibility	X Company has a strong reputation with local nonprofits and program participants. The CEO's connections in the community help X Company's workforce connect with key stakeholders and clients. X Company's workforce efforts help build stakeholder loyalty and retention of clients.
Sustain Membership	X Company leaders and staff have been able to maintain the number of membership over time. 60 percent of revenue comes from business membership revenue.
Limited direct competitors	There is a limited number of organizations with similar services to those provided by X Company in the local area.
Employee dedication to mission	X Company's workforce is closely connected to the social responsibility mission. The organization's leaders and staff are passionate about volunteerism and mission driven.

**Performance improvement system.** In accordance with X Company's 2020 strategic plan, X Company leaders and staff use the organization's 13-year history and workforce abilities to develop volunteer programs and services to support and benefit nearby communities. X Company CEO's focus will be on growth, innovation, and brand awareness. By 2020, X Company leaders seek to increase existing business partners'

engagement by an average of 15% and increase the number of business partners by 50%. They plan to achieve these goals by expanding advisory services in conjunction with volunteer leadership programs in board matching, school engagement, civic leadership, and volunteerism. X Company's leaders and staff will use X Company's organizational awareness campaign to generate and increase recognition and measure the results by business partnerships, utilization and traffic to the nonprofit's website, social media, and participation in programs and events.

### **Leadership Triad: Leadership, Strategy, and Customers**

#### **Leadership**

##### **Senior leadership. Review of how leaders lead the organization.**

*Mission, Vision, and Values.* X Company's CEO has evolved the organization's values over the nonprofit's 13-year history. X Company leaders and staff conduct strategic planning in a collaborative process to develop critical organizational vision and values. X Company has a shared process in place with the X Company's CEO as the final approving authority on vision and values. Senior leaders establish the vision and values internally by conducting annual planning to set organizational goals. Moreover, senior leaders use employee annual reviews to promote and encourage the desired behavior and core competencies that reflect the strategic vision and values important to organizational success.

X Company leaders and staff remain closely connected to the community and constantly seek to engage with stakeholders to enhance the value of services and programs. Senior leaders use the valuable information they gain to develop strategic



plans to support and communicate the nonprofit's vision. Much of the work is done collaboratively by making sure all key employees and team leaders have the support they need. Leaders empower X Company employees to lead initiatives to contribute to X Company's growth. X Company senior management tries to model desired behavior in all leadership actions. Leaders demonstrate the need for excellence and dedication to community and supportive customer service.

***Legal and ethical behavior.*** X Company has not encountered legal or unethical behavior issues. The organization is a nonprofit and leaders and staff have a goal to develop connections within the community, volunteers, and businesses. X Company's CEO has discussions with staff about the mission, strategic intent, and resources. During these discussions, the CEO reinforces desired behavior and performance. The CEO also exhibits acceptable behavior to promote an organizational commitment to legal and ethical behavior. X Company leaders define functional roles and what the roles mean for stakeholders, partners, and customers across the region. X Company's CEO also obligates employees to read the employee handbook and commit to guiding principles such acceptable behavior standards as well as X Company's policies.

***Engage workforce and customers.*** X Company leaders align services and programs with partner and customer needs because it is an important aspect of X Company operations and mission. Senior leaders use various methods to enhance communication and work to maintain a connection with the workforce. X Company senior leaders encourage a collaborative workplace to support the integration of goals to meet customer expectation. Senior managers often structure meetings so employees have

time to share activities and discuss strategic actions to achieve individual and organizational objectives and goals. Senior leaders also provide open feedback to encourage effective two-way communication. X Company CEO values honest communication. As the small workforce becomes closer, the workforce increases honest communication amongst departments and teams.

X Company leaders value the insight of employees. Leaders use weekly staff meetings as an opportunity for the senior leaders to harbor two-way communication and gauge workforces' assessment of organizational change initiatives. The nonprofit's strategic planning process is also a critical point to communicate key decisions and needs for organizational change. Actions team members regularly help identify the need for change because the X Company CEO encourages a participatory process to ease the challenges associated with organizational change.

X Company leaders lead by example to encourage, motivate, and build employee commitment to customer focus and high performance. X Company leaders' recognition of individual employee achievement is also a hallmark of X Company internal environment. Moreover, leaders deploy various activities such as fitness challenges, recognition of anniversaries, birthdays and organize social outings to build a cohesive culture. X Company leaders praise and recognize employees publicly and actively communicate organizational goals to enhance employee understanding of desired behavior and performance. X Company leaders communicating clarity of structure, roles, and processes are key to create an environment for success.

In addition, X Company leaders establish effective onboarding processes to hire employees that are compatible with the organizational mission. X Company leaders and staff also use a dashboard to provide senior leaders and the workforce a snapshot of organizational progress to achieve objectives and goals. Senior leaders document and institutionalize organizational processes, track issues, and propose solutions to maintain success for the future. X Company leaders also provide clarity about the direction of the organization and leadership motives for the organization's mission and defined workforce roles. Organizational structure is a critical aspect of X Company's operations because X Company leaders use structure to address internal and external issues. X Company leaders administer surveys and conduct focus groups to obtain valuable data and evolve and enhance programs and services to meet all stakeholder needs.

Developing relevant programs and services is critical to X Company's success. X Company leaders ensure employees are supportive of activities to fulfill the organizational mission through program and service performance. X Company leaders are developing data collection methods and data analysis to enhance organizational agility to improve stakeholder value creation. X Company leaders value organizational learning and workplace innovation. For instance, the CEO allocates \$200 to each employee annually for them to use towards professional growth courses, training, and relevant conferences. X Company leaders are seeking to improve organizational wide professional development plans and the organizational philosophy for managing this area of improvement.

Senior leaders invite guest speakers and subject matter experts to give presentations quarterly. Senior leaders work with the board of directors to develop practices to support and increase organizational innovation. X Company leaders believe that institutionalizing the hiring process and identifying X Company's strategic gaps will be a benefit to identify the development needs of new hires and current employees to build a learning organization and support innovation efforts and intelligent risk-taking. Personal drive is a key aspect of innovative success at X Company. X Company leaders allow employees to take risks within the organization's financial capabilities and commitment.

X Company leaders focus on the overall customer experience and work towards shifting from a transactional approach and interaction to a transformational experience. Senior leaders are working on crafting improved client relationships and experiences to boost alumni engagement. Another key focus is reframing program curricula to boost customer and alumni understanding of the purpose of X Company's leaders and staff's work and engagement. For example, X Company has a program that leaders and staff offer to business professionals to help build participants' skills and inform them about important issues in the surrounding area. A strategic aspect of X Company's success is leaders and staff members' continuous responsiveness to business partners. Senior leaders have begun to evaluate X Company's historical capabilities and constantly strive to place more focus on these aspects to understand how leaders and staff can meet the needs of customers and improve services important for partners' success.

X Company leaders hire employees to reflect the desired workforce culture and commitment to customer service orientation and mission commitment. X Company is improving processes to analyze of how teams are performing and developing a process to determine who, when, and why an employee deserves a leadership position and opportunities for growth within the organization. Senior leaders have a goal to become a 20-employee organization and, therefore, need to develop future leaders to avoid hiring outside of the organization to fill leadership positions and achieve the desired goal.

***Focus on action.*** The majority of meetings relate to X Company's strategic plan to build growth, brand awareness, and innovation. Leaders link action plans and organizational mission directly to growth, brand awareness, and innovation. Senior leaders are cautious and reanalyze organizational activities when they do not benefit X Company's growth initiatives, innovation, and brand awareness. Senior leaders encourage employees to evaluate the mission and ensure that their focus and actions. Leaders encourage employees to direct and orient their actions and creativity to achieve X Company's mission. X Company leaders require employees to submit a purpose document to detail and explain how X Company's workforce can use an event, training, activities to achieve X Company's objectives and how X Company's leaders and staff can use key takeaways to achieve the mission. X Company leaders also tie employees' suggestions to X Company's quarterly and yearly plans to develop individual work plans that are supervisor approved.

X Company leaders and staff use key performance indicators measures and metrics with an organizational dashboard to track and update the status of action plans

and the status of individual and organizational workforce progression to achieve objectives and goals. X Company leaders use the continuous process of creating key performance indicators to help the organization track employee efforts and performance measure. X Company leaders use purpose documents to evaluate and question employee proposed actions and push employees towards desired outcomes for strategic performance. X Company leaders' quarterly review of key performance indicators assists senior leaders' efforts to assess the work that employees have accomplished throughout the year. Most importantly, senior leaders identify areas of improvement to meet goals by closely examining key performance indicators. Senior leaders also take an opportunity to use weekly staff meetings to get valuable feedback on the progress of goals from employees.

Senior leaders have placed increasing emphasis on understanding customer and stakeholder concerns, needs, and motivations for their success. X Company leaders and staff link organizational business partners with volunteers and services that match the needs of all stakeholders. Therefore, senior leaders encourage a greater focus on ensuring there is value for businesses, volunteers, key communities, and other partners. X Company leaders and staff efforts ensure they satisfy customers. Senior leaders take accountability for organizational actions and clearly state roles, functions, and accountability by using active words to communicate responsibilities and expectations for the workforce.

**Governance and societal responsibilities.** Review of how governance system and performance evaluation.

***Governance System.*** X Company leaders ensure responsible governance by working with the board of directors to ensure X Company leaders and workforce are accountable for their individual actions. The board of directors is a second oversight of workforce actions after X Company CEO. Every year, X Company CEO hires an external certified public accountant to conduct an audit to examine X Company's leaders and staff accounting conduct and documentation of activities.

***Evaluate senior leaders.*** X Company's director of strategy and operations ensures that X Company stays on track with strategic plans. The director also works with the CEO and board of directors to establish oversight of organizational workforce efforts. X Company's CEO supports an X Company audit conducted by an external certified public accountant each year. The CEO submits the audit to the board of directors once completed. Additionally, senior CEO and leaders review X Company's financial capacity on a quarterly time frame. Senior leaders also meet with the board and staff members to report strategic initiatives, enhance communication of operations, increase funding, and provide feedback. X Company treasurer also analyzes financial records quarterly. X Company leaders have established internal policies and standard operating procedures to establish and maintain transparent operations to benefit all stakeholders to include business partners, nonprofits, volunteers, the community, and employees.

X Company has a board manual, board of engagement chief, conflict of interest guidelines, and bylaws to manage the selection and governance of board members. An employee employed by an external accounting firm conducts X Company's Financial audit. Additionally, an X Company bookkeeper acts as a check and balance on the

independence and effectiveness of internal and external audits. The CEO reviews audit documents before bookkeeper and office manager review. X Company has three level of review to ensuring independence and effectiveness of internal and external audits. X Company organizational members serve on a board committee to conduct succession planning. Senior leaders focus on succession planning because of the critical aspect leaders and staff need for continued success. Board members self-evaluate and survey overall board performance. Afterwards, X Company leaders and board members review this information. The president of the Board evaluates the performance of the CEO, and the CEO evaluates immediate subordinates.

X Company's CEO provides senior leaders with a bonus based on each individual leader's achievement of goals and objectives and other critical performance metrics. Other times, X Company's CEO uses evaluations to increase the annual salary of senior leaders. X Company's CEO bases compensation on the overall rating based on merits and cost of living expenses. Senior leaders focus on core competencies and results when they evaluate employees. Leaders ensure that the core behaviors reflect what they desire from employees to improve performance. Additionally, X Company leaders identify areas to grow because it is an important aspect of X Company's leadership system and performance evaluation. X Company leaders abide by regulations of typical nonprofits. X Company's CEO retains event insurance and volunteer insurance to mitigate financial and legal risks.

***Public concerns about products and operations.*** The lack of available volunteers and lack of adequate volunteer skills may affect operations and services which limits X



Company's impact. Additionally, Business partners' engagement may fluctuate with their individual competitive industry, economy, and other industry characteristics. Given the nature of the work, business partners' competitive industries are not a significant issue for X Company. Every year, X Company's CEO must reregister X Company as a nonprofit and apply for State tax exemption.

***Ethical behavior.*** How X Company leaders hire and develop employees is a critical method to how the leaders promote an environment for ethical behavior. During the hiring process, senior leaders assess potential new hires' judgment and decision-making. The intent is to hire employees that align with X Company's belief system. Moreover, senior leaders promote ethical behavior with what they say and do. X Company's board of directors vote on the X Company's budget, board members, and certain purchases. Additionally, auditors review minutes from board and staff meetings. Senior leaders and auditors meticulously review finances and data before going out of the organization. Ethical behavior is not an issue for X Company's leaders and staff members' line of nonprofit work.

***Societal responsibilities.*** Review of societal wellbeing and support.

***Societal well-being.*** Societal well-being is at heart at what X Company leaders and staff do to achieve the organization's mission. The nonprofit's leaders and staff strive to connect with businesses professionals, nonprofits leaders, charitable organization leaders, and volunteers to expand social responsibility throughout local communities. X Company's charitable purpose and mission is to build a better

community. The nonprofit's leaders constantly evaluate programs, services, and internal organizational activities to ensure that these factors align with ideal societal well-being.

For every dollar that donors contribute to X Company, X Company leaders and staff can generate five dollars' worth of value for the community. X Company leaders and staff leverage the time and talent of professionals to produce positive change for the community. Senior leaders and the workforce strive to ensure the community benefits from available resources, programs, services, and all key stakeholder efforts. X Company leaders and staff positively affect society because the leaders and staff try to connect experts and skilled volunteers to pressing community issues. X Company leaders and staffs' work is about connecting individuals who have time and talent to share with an organization and organizational leaders that want to address a challenge in the community.

***Community support.*** X Company's programs are critical to activate support and strengthen key communities. X Company's leaders and staff work with skilled professionals to enhance programs and services to meet community needs. The nonprofit's leaders and staff build relationships between individuals and organizations leaders who focus on making a positive change in the community. During the onboarding of new businesses, X Company leaders administer surveys to gain important information concerning the businesses' area of interest, and geographical location of interest to make an impact in the community. X Company leaders and staff try to align interests and needs of both volunteers and businesses; therefore, the initial business information that X Company leaders and staff gains is critical for all stakeholders'

desired opportunities and results. X Company leaders and staff evaluating landscape characteristics and key organizations is a valuable tool for X Company. The nonprofit leaders and staff are successful based on their ability to maneuver throughout all stakeholder needs.

X Company senior leaders assess how employees achieve X Company's mission by conducting tactical and progress meetings to evaluate workforce performance. Leaders ensure they align priorities with strategy, organizational objectives, and goals. Improving local communities is a critical aspect of X Company's mission. X Company's leaders and staff make a difference in the community with their work and employees also donate money to other charitable organizations or volunteer personally to achieve positive results for the community.

## **Strategy**

**Strategy development.** Review of strategic planning and innovation.

***Strategic planning process.*** The success of the 2020 strategic plan is incumbent upon the members of the organization and the board to commit and execute the objectives they tied to X Company goals. Critical to the success of the overall plan is the results in 2017 which X Company leaders will use to build on X Company's 13-year foundation and provide the framework for launching into the 2020 vision and all that is possible to positively impact civic engagement and volunteerism in Washington, DC area communities. X Company leaders conduct strategic planning by scheduling meetings and retreats with board members and staff members to develop the nonprofit's 2020 strategic plan and annual plan. X Company's CEO seeks valuable input from board

members, senior leaders, and the workforce to enhance the nonprofit's strategic planning process. X Company leaders also hire a consultant to facilitate the planning process.

Collectively, the board, senior leaders and the workforce conduct research and data analysis to hone the organization's capabilities and develop plans to improve performance outcomes. As a foundation for all X Company strategic and annual plans, X Company leaders and staff use a combination of historical and current data on the organization to set organizational plans and projections to achieve X Company's CEO's vision. X Company leaders administer surveys to employees and conduct investigations and analysis of X Company's background, and historical funding and donations performance. X Company also leaders evaluate how the nonprofit has evolved over time and analyze the nonprofit's strengths, weaknesses, opportunities, and threats (SWOT) and consider market characteristics and customer trends. X Company leaders developed key performance indicators and metrics for the organization and staff members to analyze and measure goals and priorities for the nonprofit's 2020 plan and annual plan.

Based on the 2020 plan, brand awareness, growth, and innovation are key goals for X Company. X Company leaders launched the strategic planning process in May 2016 to produce growth and sustainability of the organization to serve and build a better community in the Washington, DC area. Each staff member has key performance indicators, goals, and metrics for their role within the annual and 2020 plan. Leaders and staff members use the organization's dashboard to document progress towards intended goals. During meetings, leaders also reflect on objectives with staff members to determine how to adjust operations, individual behavior and to ensure employees keep a

focus on business partners and the community to achieve desirable results. X Company leaders assess each company that they work with and analyze how the partner impacts the community. Moreover, X Company leaders and staff seek to provide a roadmap for business leaders who are growing their companies' workforce and have the resources to engage the community. X Company leaders want to evolve X Company to offer more consulting and transformational experiences.

X Company leaders also analyzed how to develop a learning organization by evaluating X Company's human resources policies, work processes, organizational structure, organizational culture, and workforce development. X Company leaders want to ensure the organization has the skills and knowledge within the workforce to respond to the needs of all external stakeholders.

**Innovation.** X Company leaders use action teams to expand decision-making and have staff members weigh in on strategy and shape the work and the direction of the organization. As a result, X Company leaders also use strategy development to stimulate and incorporate innovation. Moreover, X Company leaders use a committee meeting with the board to focus on strategy and have the board members weigh in on how X Company leaders and staff can reach more partners, customers and exceed current customers' expectations. X Company leaders seek to innovate to achieve growth and brand awareness by adapting and enhancing stakeholder's overall experiences. X Company can refine program by knowing customers' needs and enhance how the nonprofit leaders and staff meet customer expectations and produce desired performance outcomes.

X Company leaders will use the strategic development process to develop, enhance and deliver more innovative and high impact programs and service to meet the needs of business organizations and key communities. X Company's innovative objectives include (a) evolve programs to respond to business and community needs proactively, (b) enhance experiences within programs and services to create transformative community connections, and (c) create a positive continuous learning organization with a workforce that is impact-oriented and innovative. X Company leaders understand the need to understand the external market to achieve high performance and meet the needs of all external stakeholders.

**Strategy considerations.** X Company leaders and staff collect and analyze relevant data and develop information for strategic planning process by reflecting on key performance indicators and determining if leaders and staff are on track to meet objectives for the year. X Company leaders evaluate the nonprofit's SWOT analysis to understand key trends and changes in the external or internal environment. X Company leaders also collect data from external stakeholders and potential stakeholders by administering surveys and conducting focus groups. X Company leaders analyze data collected to understand what information they can use to achieve strategic goals.

**Work systems and core competencies.** X Company leaders assess workforce skills, the need for new processes, and cost associated with implementing new processes to determine if X Company employees or external partners will accomplish key processes. Leaders try to understand how staff can use new processes to achieve goals and ensure that X Company has the financial resources to meet commitments and

obligations after implementation of new processes. X Company's CEO wants to remain the primary service and program provider based on nonprofit's core competencies. Although, the X Company's CEO is willing to hire external partners when necessary, cost effective, and efficient.

X Company's key work systems thrive because of human capital, external market knowledge and connections employees make with key external stakeholders. X Company leaders make work system decisions to facilitate the accomplishment of strategic objectives by using the strategic plan and determining where the organization can improve operational gaps. X Company leaders and staff analyze market trends that emerge from research and attempt to make necessary changes to processes when necessary. In addition, X Company's CEO assesses organizational needs and hire external partners when necessary. If X Company does not have a core competency or capability, X Company's CEO will hire a partner to provide the capabilities or core competencies to help X Company leaders and staff achieve strategic objectives.

**Key strategic objectives.** X Company's most important goal is to expand impact on businesses and build on key relationships with all stakeholders. X Company leaders and staff will need to increase the number of volunteers available and increase revenue by connecting with more potential business clients to achieve strategic objectives. X Company leaders want to grow the organization and enhance relationships with stakeholders to produce more stakeholder engagements to achieve a long-lasting outcome in key community areas.

X Company leaders want to alter how clients interact with X Company staff members to enhance the relationship by becoming more transformational. X Company CEO wants to alter operations to become more consultative to help business partners build a long-term plan to make a lasting impact in key communities. Reaching new markets such as financial service providers and law firms is a key goal for X Company's growth objective. The goal is to become more innovative and creative to grow the organization and meet the needs of external stakeholders.

***Strategic objectives considerations.*** X Company leaders and staff focus on growing and strengthening business partnerships and increasing the level of engagement among all stakeholders. X Company's growth goals are key to increase the nonprofit's revenue. X Company leaders analyze organizational needs and prioritize by focusing on the most critical need first. X Company leaders use the strategic objectives to address strategic challenges and leverage core competencies, strategic advantages, and strategic opportunities. Improving the nonprofit's brand awareness, innovation, and growth the nonprofit's leaders and staff will enhance the organization and achieve intended goals. Leaders and staff use their knowledge, skills, and abilities to produce the best outcome for stakeholders and X Company. Leaders and staff leverage core competencies to make connections with external stakeholders by providing education on civic engagement. X Company leaders use the workforces' relationship building abilities as a strategic advantage because there are very few organizations with similar social missions. Nonetheless, X Company leaders want to expand the nonprofit's core competencies to enhance value for external stakeholders. After review of trends in the market, X



Company leaders found key opportunities for the nonprofit workforce to do more in the community and boost the nonprofit's brand awareness.

X Company has a wide range of stakeholders; however, leaders and staff manage the stakeholder relationship by considering and balancing all key stakeholder needs. X Company leaders prioritize the objectives and goals of different clients through the nonprofit's innovation objective by trying to create effective programs and services that are suitable to the needs of business partners and volunteers. X Company leaders also developed strategic objectives in consideration of nonprofit challenges and their stakeholder needs.

### **Strategy Implementation**

**Action plans.** X Company's key short term action plans include, (a) Increase the total of employees participating in services and programs, (b) maintain member retention rate, (c) increase the number of business partners and increase business partnership revenue, (d) increase positive program survey NPS score results, (e) increase the number of members with completed plans, (f) research and create a continuum of engagement and index, (g) improve employee retention and increase positive staff survey results, (h) increase speaking engagements and the number of inbound interviews and (i) implementation of a marketing plan in order to:

1. Boost Reach and awareness: Web traffic growth: visits, page views, pages per visit and time on site.
2. Engage and sharing with stakeholders: Social media sharing, content commenting, and followers.

3. Obtain conversion and lead generation: Content downloads, event attendance, contact forms, inquiries, and referrals.

X Company's long term action plans include, (a) increase number of business partners by 100% to 100 by 2020 and increase business partnership revenue by 60%, (b) maintain 90% member retention rate, (c) increase business partners' engagement in programs and services and the community by an average of 25% or more, (d) increase positive program survey and NPS score results and 60% of members with completed plans, (e) enhance stakeholder experiences within programs and services to create transformative community connections, (f) 90% employee retention rate, (g) create a positive continuous learning organization with a workforce that is impact oriented and innovative, (h) increase reach and awareness by 100%, increase engagement and sharing by 100%, increase conversion and lead generation by 50% and (i) increase speaking engagements and the number of inbound interviews over 2019 by 20%.

***Action plan implementation.*** X Company leaders deploy action plan within a series of meetings with team members to discuss the plans. Primary managers and staff sign off on goals, objectives, and metrics associated with each action plan. Leaders link key performance indicators with the nonprofits 2020 and annual plan strategic objectives. Each staff member owns their own work plan or action plan based on the nonprofit's annual plan. X Company leaders evaluate performance by time-based achievements and number metrics by a determined timeframe.

Leaders conduct quarterly and monthly check-ins to evaluate the action plans to ensure that each action plan and employees have an adequate amount of resources.

During check-ins, senior leaders determine if employees are achieving objectives. If not, the leaders conduct corrective actions such as implement flexibility or provide more or fewer resources to ensure that the action plan is sustainable.

***Resource allocation.*** X Company leader budget before they put an action plan together. The leaders make sure they can use each action plan to achieve the long-term strategic objectives. Good budgeting, good planning and checking in throughout the process is key to X Company's success. Budgeting is a critical aspect of X Company's successful action plans; therefore, X Company leaders make budget adjustments along the way based on what is happening in key communities.

***Workforce plans.*** X Company leaders' short-term goal is to revise the nonprofit's human resources policy to improve staffing. The nonprofit is top-heavy with directors, managers, and one coordinator. The goal is to build out entry-level roles and have more even distribution in work for programs and service to provide an opportunity for individual growth within the organization. However, the overarching goal is to ensure that X Company leaders and staff members have the core competencies and capacity to achieve the nonprofit's 2020 plan. Leaders want to trust the workforce and give them an opportunity for positive change, to grow, and learn.

However, Capacity is always a challenge for X Company. Nonetheless, X Company leaders maintain a focus on the framework and plan for 2020. X Company leaders use the plans to address potential impacts on workforce members and any potential changes in workforce capability and capacity needs by obtaining workforce input. However, there is a need to gain workforce commitment to strategic objectives

and how they required by the leadership to achieve the strategic objectives. Notably, X Company leaders want to increase performance results; therefore, the nonprofit needs the capacity to achieve that goal.

***Performance measures.*** X Company leaders use key performance indicators they set at the beginning of each year to track the achievement and effectiveness of action plans. Leaders analyze the key performance indicators to determine if employees are on track to achieve desired results. The leaders use the key performance indicator results to provide resources, change action plans, or sustain actions plans. X Company leaders also use the key performance indicators to evaluate the efficiency and effectiveness of the nonprofit's operations.

X Company leaders use the nonprofit's overall action plan measurement system to reinforce organizational alignment by encouraging staff members to achieve high key performance indicator results. Also, leaders measure results and quality of impact for each program and service to understand how the workforces' work is a part of a holistic system. Moreover, leaders use the results as an indicator of where leaders should apply financial resources.

***Performance projections.*** X Company leaders seek to build better relationships with partners, volunteers, and key communities. Longer-term measures are indicators of 2020 plan success, and X Company leaders lined short-term success to the nonprofit's annual plan. X Company leaders assess organizational performance in meetings, check-ins and review of key performance indicators status. X Company leaders meet with staff

members to evaluate their performance. X Company leaders use the opportunity to ensure staff members understand their requirements and performance expectations.

**Action plan modification.** When X Company leaders need to modify action plans, a director or manager will discuss the change with the CEO and make the initial decision to change. Afterwards, the leaders make the change very quickly in an attempt stay on time with programs and services key performance indicators.

### **Customers**

X Company leaders gauge customer interests by administering surveys. Leaders use surveys to learn customers' objectives and goals to refine X Company services and programs that are relevant to customer needs and make an impact on key stakeholders. X Company leaders also conduct meetings and occasional focus groups with new customers and current customers to learn their key requirements and expectations. Customer voice data and information are key inputs for X Company's operations. X Company leaders use surveys as a primary method to gain customer insight. Leaders also make an effort to conduct in-person interviews with individual customers when possible.

X Company leaders use social media platforms such as Twitter, Facebook, LinkedIn, and Instagram to listen to customer concerns, opinions, and interests. Senior leaders track customer engagement on social media platforms by using metrics to track engagement and improve engagement with targeted outreach and communication. X Company leaders and staff use social media to improve how they connect with customers and understand their key requirements and expectations. X Company leaders and staff use customer voice data to improve the organization's awareness campaign to generate

increased recognition measured by increased business partnerships, utilization, and traffic of the nonprofit's website and social media accounts and increased participation in X Company's programs and events. X Company leaders have aligned the nonprofit's brand awareness campaign with the nonprofit's process improvement system.

X Company's customer lifecycle consists of customer recruitment, selection, engagement, and transition to *alumni hood*. Early in the customer lifecycle, X Company employees spend time with the customers by conducting meetings and phone conversations. X Company employees conduct a high frequency of phone calls with new partners to establish a working relationship. X Company leaders and staff monitor clients and partners over time and learn how clients use programs and services throughout the lifecycle to respond according to changes. Towards the end of a partnership, regardless of the reason for the end of the partnership, X Company leaders and staff engage with exiting partners to understand how X Company leaders can improve programs and services and meet customer key requirements and expectations.

X Company leaders seek actionable feedback with the use of participant surveys, events, and meetings with customers to evaluate each program and service performance. X Company leaders use customer feedback to develop courses of action to improve organization-wide performance. X Company leaders develop marketing plans to boost brand awareness. Once potential customers contact the organization, X Company's points of contact ask guided questions to understand how X Company can help the potential customer or volunteer achieve desired goals. X Company does not have a key competitor that offers similar services. X Company senior leaders use nonprofit survey

data provided by nearly 400 nonprofit organizations leaders to obtain relevant and actionable information that X Company leaders can use to improve services, programs, customer support, and transactions. X Company senior leaders also use an annual survey to obtain actionable information on programs and services. Senior leaders also use exit interviews to gain valuable insight from former employees to improve programs and services.

**Voice of the customer.** How leaders and staff obtain customers' voice.

Table 6

*Voice of the Customer*

Listening Methods	Stakeholder	Frequency
Surveys	BP, W, NP	A
Business partner, Volunteer, other Stakeholder Meetings, and focus groups	BP, V, W, C, NP	N
Phone	BP, V, C, NP	D
Email	BP, V, C, NP	D
Web-Based Forms	BP, V, C, NP	D
Social media	BP, V, C, NP	D
Staff Meetings	W	W, M, Q, A
Community Events/Forums	BP, V, W, C, NP	Q, N

Stakeholders: V=Volunteers; BP=Business Partners, W=Workforce, C=Community, NP=Nonprofits

Frequency: A=Annual, Q=Quarterly, M=Monthly, W=Weekly, D=Daily, N=As needed

***Satisfaction, dissatisfaction, and engagement.*** X Company leaders evaluate customer satisfaction and engagement through the nonprofit's NPS score. Senior

leadership evaluates the NPS score against the loyalty of the nonprofits customer relationships. X Company's senior leaders track engagement through programs based on attendance and various metrics depending on the program. Senior leaders also rely on customers to provide an account of their satisfaction by answering survey questions. X Company senior leaders use surveys to question customers about the value and effectiveness of program and service offerings.

X Company senior leaders also evaluate positive and negative testimonials to determine customer satisfaction. X Company leaders determine methods depending on the desired key outcome or engagement of each program. X Company leaders understand customers have different key requirements and expectations. Therefore, X Company leaders evaluate the potential outcome for partnership with X Company to ensure a successful outcome for both parties. X Company leaders assess customers' goal, whether the customer is growing their organization and if the client has more than 50 or more employees in the organization. Increasing networking and business development are critical to X Company leaders' relationships with business organizations.

X Company's leaders also use measurements to capture actionable information for continuity of operations if there is a leadership change. X Company's senior leaders can use the data to determine what type of engagement they want from customers and encourage further engagement. X Company has a transactional relationship with customers; however, X Company senior leaders strive to develop and enhance X Company's operations to develop a transformational relationship with customers by enhancing customer experiences with programs and services. X Company leaders will



conduct research on transformative engagement and create a continuum of engagement and index. X Company leaders also intend to conduct a pilot to determine benchmarks for future years.

Senior leaders use customers' testimonials, reflection, and survey data to enhance X Company's future performance outcomes. X Company employees listen to customers to assess customers' satisfaction, improvement, and performance outcomes to know where they can improve community impact and ability to meet and exceed customers' requirements and expectations. Senior leaders use the information to offer congruent programs and services that customers can use to achieve their goals and make a significant and positive impact on the community. X Company leaders' key indicators and measures include, (a) growing and strengthening business partnerships to increase the level of business engagement with X Company leaders, staff members, and the community, (b) creating strong awareness of the nonprofit's *business community engagement* "imperative" and building X Company's brand in the community, and (c), Developing, enhancing, and delivering more innovative and high impact programs and services.

***Satisfaction relative to competitors.*** X Company leaders and staff speak with senior business leaders that work with similar nonprofit organizations to assess their satisfaction or dissatisfaction. X Company leaders use the information to shape how the leaders and staff conduct X Company operations. Senior leaders work with staff to refine services to better suit the needs of potential customers. Senior leaders also use the NPS score to evaluate customer loyalty and engagement and determine customer satisfaction

to make necessary changes to operations to improve customer satisfaction. After review of collected data, leaders discuss how to use the data to make minor and major changes to X Company operations.

X Company leaders also use the external data to compare to X Company's data to understand how to improve operations by reducing costs, increasing revenue, and meeting customer key requirements and expectations. X Company leaders use the NPS score as an indication of customer engagement, customer satisfaction and a catalyst for improvement or sustainment of programs and service operations.

**Customer engagement.** Senior leaders use customer survey data to decide service and program offerings. X Company senior leaders also use customer survey data to customize training and to evaluate X Company's performance. X Company senior leaders develop services and programs based on needs of the community and business leader's goals and objectives for their organization to make an impact on key stakeholders in surrounding communities. X Company senior leaders look for opportunities in the marketplace and unmet needs within the community and evaluate whether X Company leaders and staff can make an impact. X Company leaders analyzed X Company's opportunities in the nonprofit sector and determined that there is growing corporate interest in social responsibility, limited direct competitors, partnership opportunities abound, a largely untapped marketing potential, client desire for thought leadership and an increase in millennial interest in volunteering.

X Company leaders determine customer and stakeholder needs and requirements for programs and services by conducting customer and stakeholder surveys, focus groups,

and in-person interviews. X Company leaders use data collection and pre-assessment procedures to determine what customers need. Throughout the partnership with current and new customers, X Company leaders adjust programs and services as needed. Senior leaders also analyze trends such as an increase in young professionals volunteering and growing interest in corporate citizenship and engagement. X Company leaders use trend information to determine if current programs and services are suitable for the changing trends and customer and stakeholder needs. X Company leaders adapt the organization to the external environment or pressing characteristics of community needs. Having an awareness of external trends, X Company leaders can use the data to support developing strategic growth.

X Company leaders identify and adapt service offering to enter new markets or attract new customers and create opportunities to expands relationships with current customers by analyzing clients' level of community engagement. Listening to clients and customers is a critical aspect of X Company's leaders' efforts to expand to new markets or offer new programs and services. X Company leaders work with staff and clients to build a roadmap to increase client engagement in key communities. X Company leaders and workforce strive to help clients make a deep and long-lasting impact and connection with key communities that have significant needs. Part of X Company's purpose is to embed a culture of social responsibility within each client organization. X Company leaders and staff constantly evaluate performance and analyze the organization's mission to learn how to facilitate stakeholder requests for new program and service offerings. Senior leaders also assess relevant information such as community

demographics and trends to create new opportunities to expand relationships with current and potential customers.

***Customer support.*** X Company leaders enable customers to seek information and support via the nonprofit's website. The website is a primary source of information on X Company's programs, services, events, job opportunities, and staff members. Customers can also contact the organization via the website. The contact section on the website has a form for inquirers to complete to reach a member of X Company's staff. The section also includes X Company's email for information and a telephone number and the nonprofit's mailing address. Stakeholders can use the website to ask questions, express concerns and receive answers from X Company's employees. The website is a bridge to create personal connections between X Company staff members and key networks.

X Company leaders enable customers by maintaining an open line of communication. X Company leaders and staff build a connection with key stakeholders and encourage a relationship between engagement and communication. X Company staff provide templates, applications for programs and services and other materials to enable customers to conduct business with X Company. The key means of X Company's customer support is maintaining an open line of communication. X Company leaders and staff ensure that stakeholders within key communities know who their point of contact is within the organization. Staff members provide training and education to enhance relationships with stakeholders. X Company leaders and staff strive to educate clients about opportunities to train and learn how the client can make a deeper impact in the community.

X Company leaders and staff work with business organizations, nonprofit organizations, and individuals to inspire volunteerism and connect all stakeholders to build stronger communities. X Company leaders offer programs and services to businesses of all sizes to assist in development and implementation of effective community engagement strategies. The number of employees engaged in social responsibility, industry, and type of X Company service or program is important for X Company's relationship with business entities. X Company's mission is partly to bring the talent of individual volunteers and business professionals to local nonprofit organizations and charitable causes. X Company's leaders' goal is to connect volunteers to organizations on a variety of levels while also providing support to increase capacity and productivity. X Company's CEO and leaders use financial performance, client retention rates, survey results and the number of completed program plans to assess progress to reach this goal.

X Company leaders and staff also provide volunteer referrals, educational seminars, and events. X Company's support for nonprofit organizations depends on the service or program that a nonprofit's leaders want for their organization. X Company leaders adapt their organization to fit the needs of clients, stakeholders, and key communities. X Company leaders determine customer's key support requirements by administering customer surveys and conducting focus groups. X Company leaders and staff members disseminate data collected from surveys and focus groups to refine how they can support customers and address their needs.

*Customer segmentation.* X Company's customer segmentation includes the Washington, DC area communities, business professionals and entities, nonprofit organizations, schools, and volunteers. X Company leaders and staff facilitates the connection between volunteers and community organizations. X Company senior leaders determine customer groups and market segments by understanding key stakeholders and their needs. Key stakeholders consist of business organizational leaders and nonprofit organizational leaders seeking volunteers and board leadership to make a positive impact in the community. X Company leaders and staff use information on customers, markets, program, and service offering to identify current customers and anticipate future customer groups, market segments, and community needs. X Company leaders use data collection and relationship building to adjust to stakeholder needs and enhance the nonprofit's operations and exceed stakeholder expectations.

X Company does not have a direct competitor; however, other organizations in the nonprofit sector such as United Way may strain X Company's organizational efforts to generate revenue from donors and other means. X Company leaders and staff use the nonprofit's network to identify potential customers and stakeholders. X Company leaders determine which customers, customer groups and market segments to emphasize and pursue for business growth by working with the nonprofit's trusted network of business professionals, nonprofit leaders, and volunteers. X Company leaders see an opportunity for business growth through relationships and key stakeholders. X Company leaders and staff seek out companies that are very active with other nonprofit organizations to determine X Company's capacity to expand impact in key communities

that X Company leaders and staff serve. X Company leaders and staff also seek to recruit companies that are growing and hiring more employees. X Company leaders and staff aim to establish relationships with companies that have the capacity to work with nonprofit organizations based on the number of workforce members and goals to increase social responsibility activities.

***Relationship management.*** X Company leaders and staff build and manage customer relationships through the deep connections the CEO and X Company's business team has with business leaders in the community. X Company leaders and staff maintain a close working relationship with points of contact for each customer organization to facilitate efforts to achieve common goals. X Company leaders and staff continue to engage and connect with customers to build upon relationships over time. The connection between X Company workforce members and individuals within client organizations is a benefit that X Company workforce members use to assess client satisfaction. Communication is an important piece of relationship management for X Company operations. X Company leaders and staff learn how customers want to communicate and how information is useful to the client. Early in the relationship X Company leaders and staff learn what goals clients want to accomplish and try to manage the relationship and focus on aspects that are important for the client.

X Company leaders and staff try to maintain customers' consistency and impact in the community throughout the relationship management process. X Company leaders market, build, and manage relationships with customers to acquire new customers and build market share by using ambassador clients, volunteers, and alumni who have

engaged with X Company in the past. X Company leaders and staff encourage past clients to be a voice for X Company's programs and services to acquire new customers or individuals that want to make an impact in the community. X Company leaders and staff encourage past clients to share their experiences with professional and personal networks to help X Company acquire new customers and enter new markets.

X Company leaders and staff ask clients, past clients, and volunteers to provide a testimonial or express their satisfaction and experience on social media to spread the word about X Company programs and services. X Company leaders and staff also analyze other nonprofit organizations for benchmark purposes and assessment of other organizations and their social impact. X Company leaders collect the information to analyze X Company's operations, programs, and services to grow customer engagement and look for opportunities to expand the nonprofit's operations to new markets.

Part of X Company's leaders' efforts to grow the organization is through marketing campaigns, events, business connections, and volunteers that made a difference in the community. X Company leaders and staff manage and enhance the organization's brand image by communicating X Company's mission and vision to achieve deep and long last impact on key communities. X Company leaders want to create a campaign to inspire and mobilize individual volunteers and business professionals and organizations. X Company leaders have collaborated with a marketing firm to develop a content marketing plan which includes campaigns to increase awareness and engagement through business professionals and volunteers. X Company's brand awareness is an area of focus for X Company's leaders because business



community engagement is a key strategy for X Company's successful mission achievement and to generate revenue.

X Company leaders understand how important it is to retain customers, meet their requirements, and exceed their expectations at each stage of the customer lifecycle. X Company leaders make customer retention a priority for the organization and encourage staff members to support customer retention efforts. X Company leaders have also set growth as a key goal to achieve by the year 2020. The leaders' goal is to grow and strengthen business partnerships and increase the level of engagement with business volunteers and key communities beyond the current 85% customer retention rate. At the end of each program or service, X Company leaders and staff survey customers to acquire lessons learned. X Company leaders use a reflection period after programs and services to gain vital information and change programs and services or present new programs and services accordingly. X Company leaders and staff keep a focus on long-term success and the "big picture" results that clients want. From the beginning of the partnership, X Company leaders and staff map out a plan with the client to get a clear understanding of the time commitment to achieve objectives and accomplish the client's overall goal.

X Company leaders and staff increase customers' engagement by understanding customers' key requirements and expectations and looking for opportunities to engage with key stakeholders. X Company leaders use customers' testimonials detailing their experiences to develop new ways to increase customer engagement over time. X Company leaders and staff also use customers' testimonials to identify key milestones

that customers seek to achieve their bigger goal. X Company leaders and staff also leverage social media to manage and enhance X Company's brand and enhance customer engagement and relationships. X Company leaders and staff accomplish social media engagement and relationship building by sharing clients' and participants' story and experiences associated with their partnership with X Company. X Company leaders and staff boost brand awareness and produce more business opportunities by taking advantage of the connection with followers on social media. On social media, X Company leaders and staff highlight customers and show what customers are doing to make an impact in the community. Second, leaders and staff review social media to share best practices and research to improve social engagement. X Company leaders and staff also promote the organization's programs, services, and events to boost awareness and stakeholder engagement.

***Complaint management.*** To mitigate and manage customer complaints, X Company leaders analyze and use customer survey data to amend operations to align with customer opinion and expectation. X Company leaders encourage staff to share client complaints with supervisors and senior leaders to adjust and rectify each issue quickly and accordingly. X Company leaders resolve complaints promptly and effectively by making changes to operations, programs, and services to address customer needs. Throughout the organization, X Company leaders and staff take customer complaints seriously. Leaders and staff members communicate with customers to acknowledge complaints and understand customer concerns. X Company leaders and staff focus on improving client experiences throughout the relationship to recover customers'

confidence, enhance customers' satisfaction, engagement and avoid similar complaints in the future.

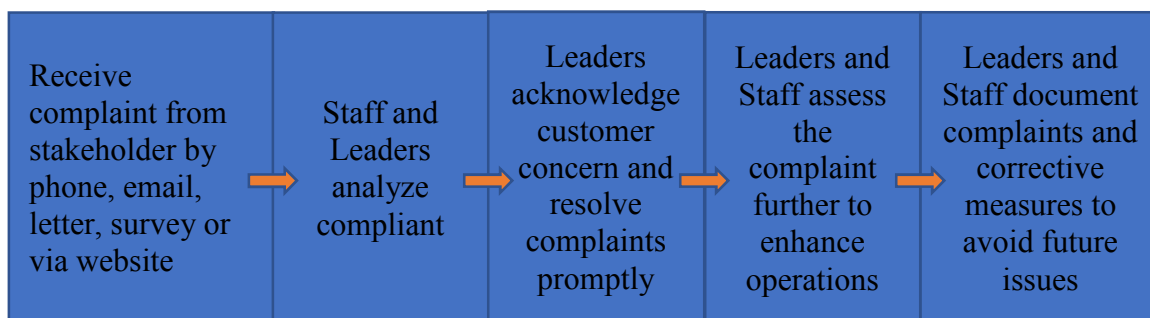


Figure 1. Complaint process.

### Results Triad: Workforce, Operations, and Results

#### Workforce

**Workforce environment.** X Company leaders assess workforce capability and capacity needs by conducting weekly check-ins with program directors and staff to discuss progress and workforce ability to achieve organizational objectives. According to the 2017 Baldrige Framework, organizational leaders should ensure employees should have the skills, abilities, and competencies necessary to achieve work processes. Moreover, leaders must ensure sufficient safety levels of employees to carry out work processes to develop programs and services. X Company leaders evaluate workforce skills and competencies constantly before hiring new employees and leaders create a rubric to assess candidates' abilities against the actual core competencies needed for the organization's culture and jobs. X Company leaders align with Maslow's (1943)

belongingness need by ensuring employees and new hires fit within the established organizational culture and leadership expectations.

Bishop (2012) noted that it is important that organizational leaders assess an applicant's alignment with the existing organizational culture to by analyzing how well the applicant will fit within the organization. Johnson (2014) argued leaders also shape organizational culture and reduce voluntary employee turnover by hiring the right applicants who have characteristics congruent with the enduring organizational culture. Leaders should understand that an employee's or new hire's ability, knowledge and skills are bonding factors to the organizational culture, peers, organizational capability, and capacity. X Company Leaders also assess applicants' past performance to evaluate their potential for X Company's jobs. Relationship building and business engagement are key competencies that X Company leaders look for in potential employees. Leaders evaluate the strategic plan, various organizational objectives, goals, and key aspects that leaders have determined to be essential to achieve desired organizational performance. X Company leaders also appraise current workforce capability and capacity to determine what skills, abilities, and knowledge the organization need from potential applicants.

X Company leaders recruit, hire, place, and retain new workforce members by posting job opportunities on X Company's website and external sites such as job boards and other nonprofit organizations. X Company leaders also send out job descriptions through close networks and encourage X Company staff to share with friends and colleagues to find potential applicants. X Company leaders highlight the skill set, knowledge, abilities, and competencies they value in potential applicants. X Company

leaders align with Maslow's self-actualization need by providing funding for employees interested in professional development and growth. Employees' motivation is intrinsically linked to the orientation of their work and how the workplace complements one's greatest needs and desires for growth (Osabiya, 2015).

X Company leaders also adjust employee salaries and their job titles as they progress in performance and development at X Company. According to the 2017 Baldrige Framework, organizational leaders should link compensation and incentive practices such as promotions to performance, employee acquired skills, culture, and adaptations to new work systems. X Company leaders ensure that the workforce represents the diverse ideas, cultures, and thinking of the nonprofit's hiring and customer community by first analyzing how the workforce makes a positive impact in the community and the connections needed to build lasting relationships. X Company leaders seek to ensure a diverse workforce to achieve X Company's objectives and goals.

X Company leaders review resumes and specifically look for applicants that have the background such as nonprofit sector experience, relationship building competencies and the motivation to meet the key requirements and expectation of X Company's external stakeholders. Therefore, X Company leaders support positive social change in key communities by ensuring the retention of a committed workforce. X Company leaders' goal moving forward is to fill crucial gaps in the workforce, improve X Company's capabilities, and ensure that applicants align with X Company's culture and organizational mission. X Company leaders hire the best available applicant for the job that is ideal for the applicant. X Company leaders understand the organization's culture

and attempt to hire applicants that have a similar focus on the nonprofit's mission and workforce.

Nonprofit leaders can use the workforces' identification and connection to the organizational mission to decrease turnover intentions and implement retention strategies (Kim & Lee, 2007; Yoshioka, 2003). Potential applicants interview with multiple staff members to see if there is a connection and potential cultural benefit to the organization. X Company leader prepares the workforce for changing capability and capacity needs by connecting performance to X Company's CEO's vision and set goals and objective described in the organization's strategic plans. When Organizational leaders present their vision, they should create a customer focus, demonstrate clear and visible values, strong ethics and set high expectations for the workforce while balancing the needs of all stakeholders. X Company leaders try to ensure the workforce can maintain performance during significant change. For instance, X Company leaders provide development opportunities by partly funding internal and external employee training and conference attendance based on organizational change and employees' need. Senior X Company leaders also serve as mentors to junior employees to guide their development.

However, Participant 1 noted that X Company leaders developed the strategic plan focused primarily on customer needs. X Company leaders have an opportunity for improvement by amending the strategic plan to apply more focus on internal stakeholders' needs. X Company leaders also keep focussing on trends such as technological shifts and training opportunities that may enhance workforce capabilities and X Company operations. Karatepe & Karadas (2012) contended organizational

leaders link and implement training, empowerment, and reward systems to boost employee innovation and gain employee commitment. Rasheed and Rasheed (2013) found that employees' perception of the availability of training opportunities improves employees' commitment to the organization. X Company is a small organization; therefore, leaders and staff have not experienced a need to reduce the workforce.

X Company leaders manage workforce needs and organization needs to ensure continuity by analyzing programs, services, and the workforce capabilities and capacity needed to achieve X Company's mission and desired performance outcomes. X Company leaders express what core competencies employees need to perform and support the organization's direction. Employees must understand the organization's growth strategy, CEO's vision, and the reasoning for key decisions that leaders make to enhance growth and the performance necessary to achieve the CEO's vision. X Company leaders currently see a need to develop formal processes to manage the workforce and organizational needs. training and development is a significant area of improvement for X Company.

Despite X Company's leaders' effort to offer training and development, according to staff survey results, training and development remain an issue. 44% of the workforce marked "neutral" or "disagree" for survey option, "I am encouraged and supported in my professional development." Fifty-five percent of the workforce marked "neutral" or "disagree" for the survey option, "I have adequate opportunities for professional growth in this organization." In comparison to scholarly research, Wang, and Ashcraft (2012) found that nonprofit employees need professional development training to enhance their

skills and gain knowledge relative to the nonprofit sector. Moreover, nonprofit employees' intrinsic motivation and desire for training and development reflects the value and pride in which nonprofit employees view their work to benefit stakeholders (Park & Word, 2012).

X Company leaders prepare for and manage periods of workforce growth by analyzing X Company's organizational chart to determine vacant positions that are critical to organizational operations and growth. Senior leaders assess X Company's structure and manage workforce growth to facilitate X Company's strategic actions, connections with key stakeholders, and leaders' desired organizational performance. Knapp et al. (2017) contended nonprofit leaders invest in understanding how organizational structures and organizational relationships relate to employee outcomes. Knapp et al. align with the 2017 Baldrige Framework guidance that organizational leaders should make modifications to organizational structures and operating modes when implementing actions plans.

X Company leaders maintain a focus on key staffing decisions to achieve strategic goals. X Company leaders manage changes throughout the year and make decisions based on organizational and employee capacity and performance. X Company's CEO an intent to enable employees' success by assessing employee's readiness for management positions or increased responsibilities. X Company leaders manage the workforce to accomplish X Company's work and capitalize on core competencies by establishing structure between program and service teams. Leaders ensure employees have an operational focus to make certain that responsibilities, functions, and procedures exist to



perform actions vital for each program and service. X Company leaders attempt to institutionalize processes and develop scalable output from the workforce.

X Company leaders' end goal in efforts to manage employees is to improve programs, services, add more clients and maintain cost-effective operations. X Company leaders reinforce a customer and business focus and attempt to exceed performance expectations by employing and deploying employees with the desired core competencies to meet customer and X Company's needs. X Company leaders hire employees that are relationship builders. The need to make connections with key stakeholders and maintain a crucial working relationship is a key and prevalent theme associated with X Company's mission. X Company leaders should assess organizational synthesis by analyzing X Company to ensure to incorporate and align key business attributes to include, core competencies, strategic objectives, action plans, work systems, and workforce needs (Baldrige Framework, 2017). Through organizational synthesis, X Company leaders can implement consistency between plans, processes, measures, and ensure effective workforce actions (Baldrige Framework, 2017).

X Company leaders and staff also match volunteers to the right volunteering opportunities or organizations with similar goals. X Company leaders and staff facilitate a smooth process for business customers by linking them with dedicated volunteers or opportunities to make a positive social impact in the community. X Company leaders and staff customize the matching process for programs and services from online applications to in-person presentations to streamline and minimize challenges to link organizations with volunteers or with X Company programs or services. For example,

potential customers fill out applications online and the information is uploaded to Salesforce ® so that all internal and external stakeholders have access to the data.

X Company leaders and staff give recommendations for social impact based on customer goals. Moreover, X Company leaders encourage all stakeholders to provide suggestions to improve on X Company's processes and procedures to meet their needs and community needs in an attempt to exceed performance expectations. X Company leaders and staff track key metrics and key performance indicators to align with organizational goals within the strategic and annual plans. Leaders also use staff meetings to evaluate performance, assess risks and determine areas for improvement. X Company leaders encourage employees to work off their plan based on their goals and objectives they seek to achieve. Every quarter, X Company leaders collect data to track individual and organizational progress and adjust functions and actions as needed. X Company leaders reinforce business objectives and goals with the workforce constantly by having discussions with the workforce on customer focus, X Company values and the need for excellent customer service.

In comparison, Peng and Pandey (2015) contended that value congruence between nonprofit organizations and employees is a key factor in long-term organizational success, employee job satisfaction, and organizational commitment. Senior leaders analyze X Company's key competencies and place individuals in positions that are suitable for the organization and leaders' desired results. Leaders also set definitive expectations for the workforce and reward and recognize employees that meet leaders and customer's expectation. X Company leaders' actions align with Terera and

Ngirande (2014) who found a positive relationship between rewards systems and employee retention. Organizational leaders boost employee morale, satisfaction, and employee retention when they implement beneficial rewards, fringe benefits, recognition incentives and bonuses in the workplace (Katuma & Kwwasira, 2015).

***Workforce climate.*** X Company is a safe and suitable environment for workforce members. X Company leaders ensure workplace health, security, and accessibility for the workforce by providing an open and orderly organization and office environment. X Company leaders are receptive to employee requests that involve workplace health, security, and accessibility. X Company has a space heater, water coolers, security cameras, and locks to secure valuable items. X Company leaders' efforts to ensure a safe working environment aligns with Maslow's security need. Maslow stated that safety needs might serve as the single most exclusive organizer of one's behavior because the need for safety can become a dominant mobilizer of one's capacities to establish order or security.

Occasionally X Company leaders and staff participate in internal fitness challenges to promote healthful living. X Company leaders analyze organizational process flow to configure the office to have a more collaborative space. X Company leaders also support a flexible work environment by allowing employees opportunities to get away from their desks to off-sites to complete work. X Company leaders survey employees to obtain their thoughts on workforce environment and evaluate employees' needs to ensure employees have the necessary technology and other tools to complete work. According to X Company's staff survey results, Employee 2 noted an appreciation

for X Company leaders' acceptance of flexibility in the workforce environment.

Employee 5 and Employee 6 noted an appreciation for the nonprofit's leaders' support for work/life balance.

X Company leaders support work/life balance aligns with researchers (Gatling et al., 2016; Lee et al., 2015) who noted the importance of employees' satisfaction of self-actualization concerning the quality of work-life balance, job satisfaction, engagement, and employee motivation. Flexible work practices tailored to varying workplace and life needs is a viable strategy that organizational leaders use to build mutually beneficial relationships with their workforce (Baldrige Framework, 2017). In addition, X Company may have limited employee turnover because Nair and Malewar (2013) stated leaders could reduce turnover by facilitating employees' work-life balance to ensure efficiency between professional and personal responsibilities.

X Company's CEO offers employees health care, dental, vision insurance, a retirement fund and short and long-term life insurance. X Company's CEO also grants employees the option to work from a remote location, approves flexible work schedules, and cover employee cell phone use while on the job. Employees receive an employee handbook when they begin work with X Company to ensure they understand X Company policies. Also, leaders provide a benefits broker to help employees understand their benefits. X Company leaders tailor benefits with consideration of the organization's diverse workforce based on age, social economic differences, and gender. X Company leaders align with Work and Park (2015) because the researchers contended organizational leaders tailor strategies to nonprofit employees based on their important

characteristics such as gender, job type, and experience. Moreover, Green and Roberts (2012), in support of Maslow's hierarchy of needs theory, expressed the importance for organizational leaders to develop reward systems to generational and individual employee needs. X Company's CEO considers how to accommodate employees based on flexibility, gender, socioeconomics, work-life balance, and individual and professional development characteristics via X Company policy.

**Workforce engagement.** X Company leaders foster a supportive organizational culture and encourage open communication, high performance, and an engaged workforce by conducting workforce meetings, developing actions teams, and making open channels of communication a hallmark of X Company culture. X Company leaders support an open office in terms of decision-making and sharing of pertinent operational information between workforce members because close relationships between employees in the small organization are key to achieving the mission. In terms of engagement, X Company' leaders structure action teams so that employees can weigh in on different programs and services even if not their main body of work. X Company leaders also conduct quarterly teambuilding sessions to boost camaraderie and increase workforce engagement. X Company leaders also provide opportunities for employees to go to community events and training in support of employees' professional and personal life. X Company leaders align with Shahid and Azhar (2013) because they stated, organizational leaders must ensure employee engagement, higher productivity, and employee motivation to adjoin business outcomes with employee retention. Furthermore,

as noted by Munish and Agarwal (2017), employee engagement is another strategy leaders use to reduce employee turnover.

X Company leaders ensure the organization's culture benefits from the diverse ideas, cultures, and thinking of all workforce members by providing opportunities for employees to weigh in on strategic direction and provide guidance on new initiatives. X Company leaders value employees' opinion on processes and performance outcomes. X Company leaders empower the workforce by supporting action team decisions and allowing employees the opportunity to provide feedback on policies that X Company's leaders establish. Leaders recognize employees' ideas and encourage employees to share knowledge and information that will help the organization overall. Employees have the opportunity to explore innovative approaches in their work to achieve the organization's mission and vision.

X Company leaders determine the key drivers of workforce engagement by administering surveys to the workforce. Managers also conduct focus groups, one-on-one meetings, and check-ins with staff members to ask targeted questions about performance and how employees feel about their work in the organization. X Company leaders afford employees the opportunity to provide information to make improvements or continue key drivers of engagement. X Company leaders believe there is a need to improve the assessment of workforce engagement. Employees engagement improves when employees perceive a safe, trusting, transparent and cooperative workforce environment (Baldrige Framework, 2017). Employee 5 stated in the staff survey that transparency is sometimes an issue within the organization. X Company leaders can

boost employee engagement by understanding how employees engage and the way employees want to engage. Kovjanic et al. (2013) found that transformational leaders induce the satisfaction of employee needs, enhance employee engagement and reduce employee turnover.

X Company leaders use indicators, such as workforce retention, absenteeism, grievances, safety, and productivity, to assess and improve workforce engagement by analyzing and looking for patterns of employee performance. X Company leaders structure the workforce performance management system to support high performance and workforce engagement by encouraging two-way communication to allow employees the opportunity to provide continuous feedback. X Company leaders align with Clark et al. (2013) because the researchers contended nonprofit leaders can understand employee needs by allowing employees to provide feedback on organizational characteristics.

Leaders set performance expectations and metrics throughout the year and provide feedback on performance constantly. Employees must agree and acknowledge they understand their job title, salary and how their role is a critical part of within the organization's success. Leaders understand the importance of employee compensation by considering workforce financial compensation, rewards, recognition, and incentive practices by analyzing organizational and workforce characteristics that factor into X Company's compensation practices. X Company leaders align with Gupta and Shaw (2014) who noted compensation relates to organizational functioning, organizational effectiveness, and employee behavior. X Company leaders begin with annual reviews and determine if an employee warrants a promotion, new title or raise.

X Company leaders reinforce intelligent risk taking to achieve innovation, customer and business focus, and achievement of action plans by encouraging adaptability to the external environment and showing support for innovative approaches to boost growth and profitability. Based on Jehanzeb and Bashir's (2013) research, X Company leaders must enhance employees' adaptability, creativity and innovative approach to improve organizational profitability by offering relevant training and development. By nature of the nonprofit sector, X Company leaders and employees understand that adaptability to change is necessary to produce the best outcome for key stakeholders and communities. However, workforce and leader development is an area of improvement for X Company.

***Workforce and leader development.*** X Company senior leaders support learning and development systems to assist members, managers, and leaders in their need for development. X Company's CEO offers \$200 for professional development opportunities outside of the organization. X Company employees take self-initiative to focus on their development; however, supervisors also encourage subordinates to take advantage of relevant professional development opportunities that employees can use to boost their job performance.

X Company leaders support Maslow and Ivtazan et al. (2013) by understanding an employee's training and development is critical to their quest for creativity, growth, and knowledge acquisition to self-actualize. X Company leaders also align with Zargar et al. (2014) because they contended that organizational leaders may encourage employee growth, development, and perception of support to reduce employee turnover. X



Company leaders look at each individual work plan and the nature of employees' work to identify gaps and areas for improvement to help employees receive training on various professional characteristics. Senior leaders also support X Company's learning and development systems by analyzing the organization to determine areas of improvement and bring in a trainer to enhance organizational performance.

X Company leaders construct the learning and development systems to effectively address and enhance operations through core competencies, strategic challenges, and achievement of short and long-term action plans. Leaders conduct Monthly strategy meetings to assess the CEO's direction and vision. X Company leaders and staff evaluate how each is connected to the organization's performance overall. Afterwards, X Company leaders encourage employees to understand how their work and dedication helps the organization, customers, and key communities. X Company leaders also develop an organizational structure to support optimal employee performance and learning and emphasize workforce learning to enhance how the workforce uses data to achieve the organization's mission and vision.

X Company leaders improve customer focus by using customer service data about programs and services and promoting the importance of eliciting customer feedback and analyzing how to make actionable changes so that X Company leaders and staff evolve and improve continuously. X Company leaders consider the learning and development desires of workforce members by conducting performance planning with employees and leaders also discuss organization and employees' goals in an effort to know the requirement to improve and achieve organizational and individual professional goals.

Leaders encourage employees to learn new skills and receive training that they can use to benefit their work and the organization. When employees finish training, leaders encourage employees to share their experiences, knowledge, new skills, or a new way of thinking to inspire and inform other members of the workforce. Also, junior level team members often shadow more senior level team members to reinforce organizational learning.

X Company leaders do not have a formal method in place to evaluate the effectiveness and efficiency of your learning and development system and leaders believe there is a need to improve how they correlate learning and development outcomes to assess workforce engagement and key business results. Leaders want to improve how they identify opportunities for improvement in workforce engagement, learning and development offerings. X Company leaders do not align with Kaur (2013) who contended senior leaders can assist employees in their efforts to reach a state of self-actualization, satisfy their employee's needs and keep them motivated and committed by conducting an accurate assessment of employees' needs. X Company leaders should seek to better understand the needs of the workforce to train and develop the workforce. X Company is experiencing significant change and therefore they must understand how to set up the workforce for success. Organizational leaders prepare their workforce for significant change by providing critical training, education, frequent communication, career counseling and consideration of future needs to achieve strategic objectives. X Company leaders can improve how they prepare the workforce for strategic plans and change by understanding employees' needs associated with strategic plans and changes.

X Company leaders manage career progression for the workforce and future leaders by assessing employees' performance and ability to take on new responsibilities within the organization. X Company leaders look for opportunities to challenge employees and determine their potential for promotions and new job functions. X Company CEO and the leadership team make the final decision whether an employee will receive a promotion or job change and base the decision on employees' competencies, skills, knowledge, and abilities. X Company leaders are working to improve this area of improvement by developing a formal process to manage employee career development and succession planning for management and leadership positions. A lack of career mobility is detrimental to employee perception of promotability, employee development, competence, and negatively correlates to turnover (Dill, Morgan & Weiner, 2014).

Moreover, Stumpf, (2014) found that career mobility and promotion are often more important to employees than financial rewards. The lack of career advancement and mobility is among the top workforce retention challenges within nonprofit organizations because nonprofit organizations often have flat organization hierarchies (Knapp et al., 2017; Baines et al., 2014). X Company leaders should construct a formal system to manage employee training, development, and advancement. Organizational leaders use workforce development systems and learning systems, and implementation of workforce-related changes to develop workforce capability and capacity needs (Baldrige Framework, 2017). X Company leaders can enhance organizational performance by

ensuring synergy between workforce training, development, engagement, career advancement and strategic leadership.

## **Operations**

**Work processes.** X Company leaders determine key service and work process requirements by aligning X Company's goals, programs, services, and performance outcomes. X Company leaders focus on internal and external factors that are important to keys program or services and the work processes necessary to meet stakeholder needs. X Company leaders decide programs, services, and structure X Company accordingly to track and support efficient implementation of new or current programs and services. X Company leaders and staff are customer focused and seek to understand customer experiences to satisfy their needs and exceed their expectations. X Company leaders and staff engage with various stakeholders associated with business and nonprofit entities. Communication amongst staff members and communication with stakeholders is critical.

X Company staff members' work coincides with the work of other staff members in different departments and actions teams. X Company leaders and staff also conduct extensive record-keeping to ensure all key staff members have a good set of records and accounts of each one of the new clients and stakeholders that work with X Company. X Company's key work processes are matching services and developing appropriate outreach for business clients, nonprofit organizations, and volunteers. X Company is a customer-dependent nonprofit organization; therefore, customer data collection and reporting processes are critical for X Company's operations. Revenue collecting is another process important to X company's success.

X Company's CEO conducts weekly check-ins with staff to analyze staff performance for program and services. Leaders also noted the importance to review the list of current customers to determine where the customers are on X Company's annual cycle. X leaders want to ensure that they deliver the programs and services that customers have paid for and expect according to the partnership agreement. X Company leaders and staff conduct customer outreach to review service delivery via events and training to make sure that staff schedule events and training opportunities accordingly. Another key requirement for X Company's processes is leader and staff biweekly review of calendars for days of service and events to organize and determine how X Company leaders and staff can maximize performance.

X Company leaders determine what key outcomes are important for X Company's success and then design programs, services, and work processes to meet process requirements efficiency, customer and organizational need and overall mission and vision. X Company leaders communicate the importance of each job, function, or role; however, the leadership should develop and detail work processes for each job, function or role and make the information available to the workforce to ensure every employee knows the responsibilities for each position. According to X Company's staff survey, Employee 1 and Employee 9 both noted the lack of knowledge and clarity of coworkers' roles. Employee 1 stated, "I think clarity about roles and more streamlined positions would be helpful to the organization." X Company leaders should provide each workforce member with the defined work processes for every job in the organization.

**Process management.** X Company leaders and staff use the nonprofit's CRM database to conduct day to day operation of work processes to ensure that they meet key process requirements.

X Company leaders analyze workflow for each program and service to assess progress and determine if employees are meeting performance metrics. X Company leaders use various statistical performance data each quarter and during weekly meetings with staff members to evaluate work processes and make changes as needed. Each X Company leader and staff member have their own process and metrics to track and improve their work processes and individual progress to the collective organizational goal. X Company leaders link metrics to each X Company program and service. Employees associated with each program or service must meet key performance indicators for each year. Key performance indicators consist of performance measures such as obtaining a certain number of volunteers, business partners, NPS score or revenue for a year.

**Innovation management.** X Company's CEO encourages and empowers everyone in the organization to pursue opportunities for innovation to make a positive impact on X Company's mission. X Company leaders and staff conduct meetings at the end of each year to discuss future organizational goals and opportunities for innovation. X Company's CEO gives staff members an opportunity to share ideas and information on what encouraged staff members throughout the year. X Company's CEO and other leaders use the information to set goals for innovation and other organizational changes respectively. Innovation is an X Company priority and a key aspect of the nonprofit's

strategic plan. X Company leaders and staff seek to use innovation to improve customer satisfaction, present new programs and services and make a greater impact in key communities.

X Company's CEO and other nonprofit leaders often face a challenge to obtain the financial revenue to pursue various opportunities. Therefore, X Company's CEO allocates non-financial resources more often than financial resources in support of staff members that pursue innovative risks. X Company's CEO supports employees' effort to innovate in ways that are productive and cost efficient. X Company's CEO discontinues pursuing opportunities at the appropriate times to enhance support for higher organizational priorities and less risky opportunities. Innovation is a key part of the nonprofit's strategic 2020 plan. X Company committee leaders and board members engage in conversations about boosting innovation by supporting employee ideas or ending risky opportunities.

### **Operational Effectiveness**

Eighty percent of X Company's costs is staff salary and benefits and the other 20% is an operational budget for facilitates and technology. X Company leaders try to control cost by reviewing programs and services costs annually and conducting organizational cost analysis every two years. X Company leaders evaluate the organization to find where the CEO can cut costs. X Company leaders ensure the reliability of information systems by conducting technology audits to determine how to structure technology and manage data to make a greater impact. However, this is an area of growth for X Company. X Company leaders ensure the security and cybersecurity of

sensitive or privileged data and information by limiting the number of staff members to access sensitive information such as payroll systems, staff files, and other privileged information. X Company's CEO established checks and balances to manage electronic information that employees receive.

**Supply-chain management.** X Company leaders and staff manage the supply of volunteers for clients, events, and other opportunities to make a positive impact on key communities. X Company's business team staff reaches out to partners to build relationships. X Company leaders and staff use the close relationship with partners to ensure that the nonprofit has access to volunteers when needed. X Company leaders and staff manage the collection of potential volunteers through an application process. Potential volunteers provide information and X Company staff members input the information into the Salesforce database until X Company leaders or staff find the right match for an organization and volunteer.

**Safety and emergency preparedness.** X Company's CEO provides a safe operating environment by offering an employee manual with office safety and conduct policies. X Company leaders attempt a fire evacuation twice a year. X Company leaders ensure that the organization workforce stays prepared for disasters and emergencies by preparing emergency plans that entail how to back up data to continue business operations and other safety concerns. Safety and emergency preparedness is an area of improvement because the organization does not have a thorough plan in place for safety or business continuity of the organization experiences a network failure.



## **Measurement, Analysis, and Knowledge Management**

### **Measurement, analysis, and improvement of organizational performance. X**

Company leaders and staff track data and information on operations and overall organizational performance through preset metrics and key performance indicators that leaders and staff report and discuss during meetings on a weekly and monthly basis. X Company leaders and staff develop key performance indicators at the beginning of each year and then track the key performance indicators throughout the year. X Company leaders work with program directors to develop performance metrics for each of X Company's programs and services. Leaders evaluate program performance over time and obtain a report from program managers about program data, key objectives, and performance.

X Company staff members input program data into Salesforce, a leading customer relationship management platform. X Company leaders evaluate key program data and make changes to X Company operations accordingly. X Company employees select, collect, align, and integrate data and information to use by tracking their own daily performance.

X Company leaders and staff select comparative data and information to support fact-based decision making on an ongoing basis. Leaders and staff evaluate nonprofit survey data and use the data to make fact-based decisions and alter X Company's programs to maximize performance outcomes. Also, senior leaders send out a survey to allow business partners the opportunity to evaluate programs and services. X Company leaders use a business survey and nonprofit survey data to evaluate performance and

refine X Company's programs and services. Evaluating other similar organizations factor into X Company's leaders' decision-making process. X Company leaders collect and select data relevant to their pending decisions that will affect the organization. X Company leaders specifically review organizations that have similar and successful programs and seek data to produce comparable outcomes. X Company leaders look for comparable data such as financial data or organizational spending on a year by year basis to compare to X Company's performance data. X Company leaders scrutinize the data to find variations or similarities and use the information to make better decisions about X Company's operations.

X Company leaders select voice of the customer, market data, and other information by sending out a customer survey to get an understanding of customer opinion on X Company's performance. X Company leaders and staff use the information to adjust operations and meet customer expectation. There is an emphasis on X Company to understand customers' goals and capacity for social responsibility ensure that customers, volunteers, and X Company's workforce join and maximize customer commitment to achieve positive social change in communities. X Company leaders analyze customers' responses to survey questions about their observations, experiences, and opinions about X Company's programs and services. X Company leaders take the information and determine relevant aspects of the information to better deliver X Company's programs and services.

X Company has not experienced an abrupt change that would require X Company leaders to adjust the organization's performance measurement system. However, X

Company is a nimble organization with the workforce capacity to respond quickly to internal and external change. X Company leaders express the need for resiliency and adaptability to the organization's workforce. X Company leaders and staff focus on meeting the needs of key stakeholders whether internal change such as staff vacancies or external factors such as a global financial crisis may hamper organizational workforces' efforts.

*Performance analysis and review.* X Company leaders review the organization's performance and capabilities by developing annual and future strategic plans. X Company's leaders have linked X Company's operations, objectives, and goals to annual and strategic plans. Senior leaders, program directors and staff track progress achievement of objectives on organizational databases such as the nonprofit's dashboard. X Company's dashboard contains metrics that X Company's leaders set at the beginning of each year for the strategic plans. Leaders and staff use the dashboard to update relevant information about individual and organization-wide performance to reach organizational goals.

Moreover, on a quarterly basis, X Company leaders and staff evaluate programs and service performance and each employee analyzes their programs and services and how they are performing individually. X Company leaders and staff review the performance of key metrics to determine what needs to change or continue. X Company's board of directors also review the organization's performance and progress on strategic objective and actions plans to make recommendations to improve strategy

and key outcomes. After the board members and senior leaders decide, X Company leaders share guidance for actions, progress, and any new initiatives for the workforce.

Table 7

*Key Performance Indicators and Metrics for X Company's Strategic Focus*

Growth Objectives:	2016	2017	2018	2019	2020
1. Increase the number of business partners by 100% to 100 by 2020 and increase business partnership revenue by 60%.	55	65	75	90	105
	\$ 650,000.00	\$750,000 (+15% over 2016)	\$863,500 (+15% over 2017)	\$992,500 (+15 over 2018)	\$1,160,000 (+15 over 2019)
2. Maintain 90% member retention rate.	85%	87%	88%	90%	90%
3. Increase business engagement in programs and services and the community by an average of 25% or more.	On average, members use 3 out of 6 services.	Based on the 2016 benchmark, members use 10% more programs and services	Based on the 2017 benchmark, members use 15% more programs and services	Based on the 2018 benchmark, members use 20% more programs and services	Based on the 2019 benchmark, members use 25% more programs and services
	Total # of employees participating in programs/services	Increase total # of employees participating in services/programs (over 2016)	Increase total # of employees participating in services/programs (over 2017)	Increase total # of employees participating in services/programs (over 2018)	Increase total # of employees participating in services/programs (over 2019)

Innovation Objectives:	2016	2017	2018	2019	2020
1. Evolve programs to proactively respond to business and community needs.	Measure evolution of programs:	Increase over 2016 benchmark by: Positive program survey results/NPS	Increase over 2017 benchmark by: Positive program survey results/NPS	Increase over 2018 benchmark by: Positive program survey results/NPS	Increase over 2019 benchmark by: Positive program survey results/NPS 60% of members with completed plans

	Positive program survey results/ net promoter score (NPS) <sup>1</sup> 30% of members with completed community engagement plans	40% of members with completed plans	45% of members with completed plans	50% of members with completed plans	<i>(table continues)</i>
2. Enhance experiences within programs and services to create transformative community connections.		Research and create the continuum of engagement/index	Conduct a pilot to determine benchmarks for subsequent years. X% of individuals moving at least 1 or more levels along the continuum	Will insert end of 2018 - Increase X% of individuals moving at least 1 or more levels along the continuum	Will insert end of 2019 - Increase X% of individuals moving at least 1 or more levels along the continuum
			Conduct a pilot to determine benchmarks for subsequent years. Increase X% of businesses moving at least 1 or more levels along the continuum/index	Will insert end of 2018 - Increase X% of businesses moving at least 1 or more levels along the continuum/index	Will insert end of 2019 - Increase X% of businesses moving at least 1 or more levels along the continuum/index
3. Create a positive continuous learning organization that is impact oriented and innovative.	60% employee retention rate Implement a staff survey December 2016 and use results to guide improvements for 2017 benchmark	75% employee retention rate Increase positive staff survey results over 2016 by X%	85% employee retention rate Increase positive staff survey results over 2017 by X%	90% employee retention rate Increase positive staff survey results over 2018 by X%	90% employee retention rate Increase positive staff survey results over 2019 by X%

<b>Brand Awareness Objectives:</b>	<b>2016</b>	<b>2017</b>	<b>2018</b>	<b>2019</b>	<b>2020</b>
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<sup>1</sup> Surveys to include program participants, business partners, and nonprofit partners

1. Grow awareness and understanding of X Company's mission, vision, programs, and services to current and prospective partners and stakeholders	Implement Right Source marketing plan in order to increase X Company: 1. Reach and awareness: web traffic growth: visits, page views, pages per visit and time on site 2. Engagement and sharing: social media sharing, content commenting, and followers 3. Conversion and lead generation: Content downloads, event attendance, contact forms, inquiries, referrals	Use data from 2017 implementation to determine 2018(+) baseline benchmarks for reach/awareness, engagement/sharing, conversion/lead generation	2019 benchmarks for reach/awareness, engagement/sharing, conversion/lead generation TBD.	Increase reach and awareness by 100% Increase engagement and sharing by 100% Increase conversion and lead generation by 50% <i>(table continues)</i>
2. X Company is positioned as the thought leader and experts in corporate social responsibility & civic leadership	- 13 speaking engagements or interviews - # inbound inquiries	Increase speaking engagements and # of inbound interviews over 2016 by 20%	Increase speaking engagements and # of inbound interviews over 2017 by 20%	Increase speaking engagements and # of inbound interviews over 2018 by 20% Increase speaking engagements and # of inbound interviews over 2019 by 20%

<b>Anticipated Revenue</b>	<b>Anticipated Expense</b>
2016 Total projected = \$905,000	2016 Total projected = \$900,000
2020 Total projected = 1,560,000	2020 Total projected = \$1,510,000
(73% growth)	

**Performance improvement.** X Company's leaders project the organization's future performance with the use of strategic plans. X Company's leaders project the organization's future performance with the use of strategic plans. X Company leaders develop key performance indicators from the three strategic focus areas that they used to

develop the 2020 plan with goals and objectives. X Company leaders set December 31<sup>st</sup> as the target date to evaluate key performance indicators results.

X Company leaders also emphasize the need for forecasting the performance of partnership agreements that they align with organizational performance in terms of expenditures and revenue. X Company leaders and staff also project cohort-based programs to assess key outcomes for each quarter and end of program goals. X Company leaders reconcile any differences between projections and key action plans by reviewing quarterly progress data and making changes accordingly.

**Information and knowledge management.** X Company leaders use findings from performance reviews to develop priorities for continuous improvement and opportunities for innovation by reviewing employee feedback and the data that leaders collect during 6-month and annual performance reviews. X Company leaders also conduct weekly check-ins with staff to have discussions about performance and obtain real-time feedback for process improvement. X Company leader also uses employee exit interviews to ask departing employees about their opinions about X Company's areas of improvement. Senior leaders share findings with program and service directors to analyze the organization's areas of improvement collectively. X Company leaders and staff conduct the organization's operations with the assumption that information customers and volunteers present to the organization are accurate. X Company does not have a formal verification procedure in place to validate the quality of organizational data. X Company leaders have an opportunity for organizational improvement by developing a standard operating standard to verify information.

***Data, information, and information technology.*** X Company leaders and staff ensure the availability of organizational data and information by conducting office meetings and sharing impact reports with detailed information on program and service information. X Company leaders and staff rely on key staff members for each program, service, or organizational function to disseminate information on their focus area and actions to achieve goals within the strategic plan. For example, X Company's accountant shares critical financial information relevant to the vitality of X Company's programs and services. Key staff members and leaders also update pertinent information on Salesforce to ensure all leaders and staff have the most up to date information on programs, services, and customers. X Company leaders provide needed data and information to the organization's workforce, suppliers, partners, collaborators, and customers in a timely manner and user-friendly format by sending out reports on the state of current programs, services, accomplishments, and other pertinent information. X Company leaders would like to obtain more revenue to invest in user-friendly information technology systems.

X Company leaders build and manage organizational knowledge by ensuring that employees disseminate effective and efficient processes to all departments in the organization. X Company leaders also facilitate debrief meetings and reflection sessions after events to capture all the details and valuable feedback on important information. X Company leaders emphasize the importance of document details on objectives, goals, and performance metrics thoroughly. X Company's leaders and employees use meticulous record keeping on critical aspects such as revenue to obtain knowledge, share the knowledge and secure the information for posterity.



X Company leaders also make employee professional development a priority by providing training and education opportunities on various topics. X Company's management team evaluates the organization's and individual learning needs and construct professional development plans for each year. By the nature of X Company's sector and areas of focus, it is important for leaders and staff members to build relationships with stakeholders and counterparts in key networks to obtain and share knowledge. Available knowledge is important for organizational strategy, operations, and day to day work in X Company.

X Company leaders ensure employees share best practices during biweekly meetings. Employees document processes or create a manual and save and share the information on the organization's shared computer drive. Leaders and staff also make use of e-mail to disseminate information to program directors and team members. The way X Company leaders use knowledge and resources to embed learning through their understanding of the critical need to adapt to internal and external characteristics. The nonprofit sector changes rapidly; therefore, X Company leaders and staff must manage organizational resources and organizational learning to keep pace or catch up to internal and external changes. For instances, voluntary employee turnover has negatively affected X Company's organizational learning. Nonetheless, X Company leaders have an aim to build a positive learning environment throughout the workplace.

## Collection, Analysis, and Preparation of Results

### Service and Process Results

X Company results are based on mission and X Company leaders and workforce ability to accomplish the mission measured by the number business customers, nonprofits, and volunteers that X Company leaders and staff engage. X Company results are also based on financial donations donors give to schools and the nature of X Company's leaders and staff work that translate to monetary performance. Also, important for X Company's results is the work leaders and staff complete work that is not quantifiable such as the work volunteers do for schools and other organizations through their connection with X Company. X Company leaders reference the metrics for success they used for past performance results and evaluate key performance indicators they set at the beginning of the year. Senior leaders also look for trends that indicate desired performance. A significant trend is that X Company leaders and staff were able to successfully double the number of advisory boards for schools. X Company leaders and staff can make a great impact on schools and the local communities.

**X Company impact.** For every dollar (\$1) contributed to X Company, leaders and staff return five dollars to the community.

- To date, X Company has completed more than 675 board matches. Thirty-five percent of those board members are now in leadership roles.
- Through the coordination of 465 team volunteer projects, X Company leaders and staff have helped more than 100 nonprofits leaders improve their

facilities, clean and beautify green spaces, waterways, and deliver much-needed services to the community.

- X Company leaders and staff have provided valuable resources and training opportunities to more than 4,290 business professionals and 1,925 nonprofit staff members.
- Since 2003, X Company leaders and staff have connected more than 190,000 individuals to volunteer opportunities and has infused more than \$29 million in time and talent into the Washington, DC area.

<b>X Company Program and Service Results 2015-2016</b>	<b>2013</b>	<b>2014</b>	<b>2015</b>
<b>Board Matches Completed</b>	55	61	68
<b>Attendance at Trainings &amp; Events</b>	1,440	1,347	2,526
<b>Advisory Services/Consulting for Businesses</b>	15	19	18
<b>Team Volunteer Projects/Days of Service</b>	58	60	65
<b>Skilled Volunteer Placements</b>	55	48	67
<b>School &amp; Business Projects &amp; Partnerships</b>	27	30	29

<b>Program Class</b>			
<b>Volunteer Contribution (in hours)</b>	1,473	927	2,542
<b>Alumni Program</b>	143	182	221
<b>Supported (Active) Nonprofits/ Total Nonprofits</b>	250/370	270/420	300/465

Figure 2. X Company key program and service outcomes for years 2013 to 2015.

Growth – Participants	Staff to Track	Q1	Q2	Q3	Q4	2017 Goal	Status	Notes
Volunteer Program	Employee 1	35	-	-	-	36	Not Met/Complete	20% increase in applicants as compared to applications in 2016
Team Volunteering	Employee 2	30	307	404				No participation goal included in annual plan
Broad Program 1	Employee 1		26	27		60	Potential Risk	Increasing the number of matches at Program 1 from 48 to 60 in 2017
Broad Program 2	Employee 1	7	11	10		80		How many Program 2 seats have been "sold"? How many candidates are in the 2017 pipeline?
Volunteer Program 3	Employee 2	-	33	50				No participation goal included in annual plan
School Program	Employee 3	9	8	7		14	Not Met/Complete	Goal set to complete by Q3
Boards & Volunteers Program	Employee 3	58	126	-	-	109	Met/Complete	
Program 4	Employee 2	-	107	-	-	200	Not Met	
Business Program	Employee 5	-	-	-		100		Goal not included in annual plan
Leadership Trainings	Employee 2	30	56	70		200		Goal not included in annual plan
Program 5	Employee 1	14	20	13		60	Potential Risk	Increase the % of Program 2 candidates who attend Training from 85% in 2016 to 90% in 2017

Innovation	Staff to track	Q1	Q2	Q3	Q4	Goal	2017 KPIs/Goal	Status	Notes/Questions
<b>Board Leadership Program</b>									

Board Matches via Program 1	Empl oyee 1	5	8	7	80	80 Board matches + Program 1	Potential Risk	How many program seats have been "sold"? How many candidates are in the 2017 pipeline?
Board Matches via Program 2	Empl oyee 1	16	3	9	60	Increasing the number of matches at Program 1 from 48 to 60 in 2017	Potential Risk	
Program 5 Training attendance	Empl oyee 1	14	20	13	90%	Increase the % of Program 2 candidates who attend Training from 85% in 2016 to 90% in 2017 (Trained Matched // Total Matched in 2016)	Potential Risk	
<b>Skilled Volunteering</b>								
Projects - applications	Empl oyee 1	12	-	-	-	15	15 applications	Not Met/Complete remove in 2018
<b>Team Volunteering</b>								
Team Volunteer Projects - # of sites	Empl oyee 2	1	22				Goal/metric not included in annual plan	
Team Volunteer Projects - # of participants	Empl oyee 2	30	307				Goal/metric not included in annual plan	
Team Volunteer Projects- # of companies	Empl oyee 2	1	4				Goal/metric not included in annual plan	
<b>Volunteer Engagement</b>								
Volunteer Referrals (# of people)	Empl oyee 2	37	39				Goal/metric not included in annual plan	
Volunteer Website responses	Empl oyee 2	101	104		400	Increase the number of responses made on VC.net from 338 to 400 in 2017	Potential Risk	Cumulative or actuals by Q?
Managed volunteers	Empl oyee 2	2						
Recruited volunteer hours	Empl oyee 2	67						
<b>School Program</b>								
Total School Program partnerships	Empl oyee 3	9	8	7	14	Grow the number of school-business partnerships by 27% from 11 to 14 by the end of Q3.	Potential Risk	
New School Program partnerships	Empl oyee 3	1	0	0	3	KPI- Increase School program partnerships from 11 to 14 by the end of Q3	Potential Risk	

Number of School Program partnerships converted to Advisory Board program			1			Goal/metric not included in annual plan	Is this the goal of the program? How does this relate to
Number of active volunteers working with school advisory boards	Empl oyee 3	59	126	132		Grow the number of volunteers participating in the advisory board program by 122% from 49 to 109 individuals by the end of Q2.	Met/Complete What is "active"?
Number of new Advisory Board volunteers			75	-		Goal/metric not included in annual plan	Disaggregate 126 above
Total Advisory Boards		10	22	21		Add 10 Advisory Boards by the end of Q2 2017	Met/Complete
New Advisory Boards	Empl oyee 3	-	12	-	-	Goal/metric not included in annual plan	Complete
Annual retention rate of 85% for Advisory Board schools	Empl oyee 3	-	-	95%	-	Retain 85% of partner schools	
Annual retention rate of 85% for School-Business Partnerships (or converted to Board program)	Empl oyee 3	-	-	88%	-	Retain 85% of School Business Partnerships	
Annual retention rate of 85% for Advisory Board volunteers	Empl oyee 3	-	-	88%	-	Retain 85% of volunteers	What is the actual number? Based on 49 participating board members from 2016-17
Survey response rate of 85% from participating schools	Empl oyee 3	-	-	80%	-	85% response rate from schools	This is focused on completion, not content
Survey response rate of 85% from volunteers	Empl oyee 3	-	-	71.9 0%	-	85% response rate from volunteers	This is focused on completion, not content
<b>Program 1</b>							
Attendance at Program 1 workshops	Empl oyee 1	97%	88%	77%		90% attendance rate at workshops	Goal/metric not included in annual plan
Attendance at Program 1 happy hours	Empl oyee 1	89%	23%	20 people		60% attendance rate at Happy Hours	Goal/metric not included in annual plan

Average attendance at Recruitment Happy Hours	Employee 1	-	-	20 people					30 total
Session evaluation scores-usefulness	Employee 1	100%	97%	80%		85% useful rate on workshop evaluations			Goal/metric not included in annual plan
Program 1 Application - Number of applicants	Employee 1	-	-			20% increase in applicants			Goal/metric not included in annual plan
Program 1 Application - diversity	Employee 1	-	-			25% classmates of diversity			Goal/metric not included in annual plan
Program 1 Application-company diversity	Employee 1	-	-			Program 1 applications from 5 new companies			Goal/metric not included in annual plan
2018 Program 1 curriculum	Employee 4	-	-	-		Complete final curriculum			

***NPO Services***

Active Nonprofits	Employee 2	448	465			Strengthen the NPO database by adding or updating 50 nonprofit records by year end.			Goal/metric not included in annual plan
Nonprofit training attendance Program 3	Employee 2	0	33	50		Actual attendance at each event by quarter			Goal/metric not included in annual plan
Nonprofit training attendance Program 3 - average	Employee 2	-	-	-		Average attendance of 25 at Program			Goal/metric not included in annual plan

***Training and Events***

Program 4 participant attendance	Employee 2	-	107	-	-	200		Complete/Not Met	Goal/metric not included in annual plan
Program 4 NPO attendance	Employee 2	-	23	-	-	20 NPOs		Met/Complete	Goal/metric not included in annual plan

<b>Brand Awareness</b>	<b>Staff to track</b>	<b>2016 FINAL</b>	<b>Q1</b>	<b>Q2</b>	<b>Q3</b>	<b>Q4</b>	<b>2017 Final</b>	<b>2017 Goal</b>
<b><i>Reach and Awareness</i></b>								
Website sessions <i>Total number of Sessions within the date range. A session is the period time a user is actively engaged with your website, app, etc. All usage data (Screen Views, Events, E-commerce, etc.) is</i>	Employee 6	725					0	Increase reach and awareness by 20% from 725 to 870 website visits

<i>associated with a session.</i>					
Page views	Employee 6	1,439		0	Increase reach and awareness by 20% from 1,439 to 1,727 page views
Pages per visit	Employee 6	1.64			Increase reach and awareness by 20% from 1.64 to 2 pages per visit.
Time on site	Employee 6	0:50			Increase reach and awareness by 20% from 50 seconds to one minute on the website per visit.
<b>Engagement and Sharing</b>					
Social media shares- Facebook	Employee 6	Pending	17	14	
Social media shares- Instagram	Employee 6	Pending	NA	NA	
Social media shares- LinkedIn	Employee 6	25 in 2016	12	5	
Content commenting/CC mail forwarding?	Employee 6	NA- 2017	NA	NA	
Followers – Facebook	Employee 6	129 new in 2016 (1553 total)	1575	1607	
Followers- Instagram	Employee 6	108 total	148	208	
Followers- LinkedIn	Employee 6	76 new followers in 2016 (total 340)	93	Total Followers = 383	
<b>Speaking Engagements</b>					
External presentations	Employee 6	-	2		Increase by 20% from 13 to 16 (combined across all speaking engagement types)
Panels	Employee 6	-	2		
Inbound interviews	Employee 6	-	0		

*Figure 3.* Key performance indicators for X Company’s growth, innovation, and brand awareness goals.

X Company leaders use metrics and guidelines to help integrate various platforms such as Salesforce the nonprofit’s CRM tool to ensure a seamless process to allow customers, volunteers, and X Company workforce to interact with data and communicate. X Company leaders and staff implemented the integrated process to facilitate communication and a connection between key stakeholders to ensure effectiveness and efficiency. X Company leaders and staff constantly seek ways to improve operational



results. X Company's system or process is a year-over-year process. X Company leaders focus on growth results to boost X Company's revenue and impact in key communities. In 2012, the Board participated in a strategy session that resulted in the identification of five growth strategies for X Company leaders to implement over a three-year period.

<b>Growth Strategy Results 2013 – 2015</b>	
<b>Growth Strategies (2013-2015)</b>	<b>Status (2016)</b>
<b>Growth of Board Matching and Candidate Engagement</b>	In 2014, X Company leaders created a board matching event, and have matched 30 people through that event. X Company leaders also added more board training for previously matched candidates. X Company leaders are planning to create a board leadership network to increase engagement.
<b>Increase number of and support for Young Professionals/Next Generation Civic Leaders</b>	X Company leaders created in partnership with the Economic Alliance of Greater Baltimore. Participants purchase passports/registrations to attend civic education, civic engagement, and leadership skills workshops.
<b>Further development of Skilled Volunteering efforts including School Program</b>	X Company leaders have evolved the school program to include an Advisory Boards for Schools offering. In partnership with The LEADERship and X Company's network (partners, alumni, professional program candidates etc.) ten City Schools will begin the 2016-17 school year with a volunteer advisory board. X Company leaders also created a skilled project component to for other programs and are developing a clear skilled volunteering process.
<b>Retool online volunteer matching program</b>	In 2015, X Company leaders migrated the nonprofit's volunteer matching website to a new web-based platform which has improved connections, communication with volunteers, and X Company leaders and staff tracking ability.
<b>Create a Campaign to Inspire and Mobilize more Individual Volunteers and Businesses</b>	X Company leaders and staff did not make progress here. X Company leaders are not working to develop a content marketing plan with a marketer. X Company's marketing plan includes campaigns to increase awareness and engagement by businesses and volunteers.

*Figure 4.* Status of growth of X Company strategies.

## Customer Results

X Company leaders and staff use a net promoter score (NPS) and an annual customer survey to gauge customers' satisfaction and dissatisfaction. In addition, X Company leaders use anecdotal information from customers, testimonials, customer retention rates and board retention rates to understand how well X Company employees met customer expectations. X Company customer engagement results vary by program. X Company leaders and staff conduct events and programs to boost engagement and determine how stakeholders learn about the organization and sign up for services and programs. X Company leaders analyzed customer engagement and determined that customers only utilize about 70% of services that X Company offers in the partnership. X Company's CEO relies on X Company's business engagement team members to boost customer engagement.

Positive survey results - Business Professional Program	85%
Positive survey results - Team Volunteering	80%
Positive survey results - School program	85%
Positive survey results - Boards Matching	85%
Positive survey results - Training	80%

*Figure 5. 2017 NPS score results.*

**Workforce Results**

X Company leaders assess workforce capability and capacity results by administering employee surveys. X Company leaders use the surveys to understand employee satisfaction and emotional engagement and attachment to the mission. X Company leaders attempt to identify key results across each team, program, and service. X Company leaders administer a staff survey to evaluate workforce climate. The survey is an opportunity for employees to provide their perspective and communicate their satisfaction level with various organizational aspects beyond organizational climate. X Company leaders assess organizational climate and attempt to structure a positive organizational setting to boost morale and long-term workforce creative impact. X Company leaders encourage employees to boost their engagement and work together to achieve X Company mission.

X Company leaders also attempt to make employees feel a connection to the organization by recognizing birthdays and creating social gatherings. Teamwork is a highlight of X Company's workforce engagement. X Company leaders administer a staff survey to assess and understand how to improve workforce engagement results. X Company leaders seek to develop the workforce and potential leaders to improve and better the organization. X Company's CEO supports internal promotions for vacant positions; however, X Company does not have a formal process for leadership training or development. Workforce and leader development is an area of improvement for X Company. X Company leaders administer staff surveys to understand how they can better enhance workforce development.

Value	Question	Strongly Disagree (1)	Disagree (2)	Neutral (3)	Agree (4)	Strongly Agree (5)	Total	Average Score	Average Rating
Collaboration	Information and knowledge are shared openly within this organization.	1	4	3	1		22	2.4	Disagree
Collaboration	Senior management communicates well with the rest of the organization.		2	3	4		29	3.2	Neutral
Collaboration	Communication is encouraged in this organization.		1	3	4	1	32	3.6	Agree
Collaboration	X Company senior managers demonstrate strong leadership skills.			3	4	2	35	3.9	Agree
Collaboration	There is a strong feeling of teamwork and cooperation in this organization.			3	4	2	35	3.9	Agree
Collaboration	X Company senior management leads by example.		1	2	3	3	35	3.9	Agree
Collaboration	Employee job satisfaction is a top priority of senior management.		1	1	5	2	35	3.9	Agree
Collaboration	Teamwork is encouraged and practiced in this organization.			3	3	3	36	4.0	Agree
Collaboration	The leaders of this organization know what they are doing.			1	6	2	37	4.1	Agree
Collaboration	The organization values the contribution I make.			1	6	2	37	4.1	Agree
Collaboration	My coworkers care about me as a person.			1	5	3	38	4.2	Agree
Collaboration	I respect the senior leaders of this organization.				6	3	39	4.3	Agree

Value	Question	Strongly Disagree (1)	Disagree (2)	Neutral (3)	Agree (4)	Strongly Agree (5)	Collaboration Value Score	3.8	Agree
Evolution	I receive the training I need to do my job well.		3	2	3	1	29	3.2	Neutral
Evolution	We work to attract, develop, and retain people with diverse backgrounds.		2	2	4	1	31	3.4	Neutral
Evolution	I have adequate opportunities for professional growth in this organization.		1	4	3	1	31	3.4	Neutral
Evolution	I am encouraged and supported in my professional development.		1	3	3	2	33	3.7	Agree
Evolution	Senior management is genuinely interested in employee opinions and ideas.		2	1	3	3	34	3.8	Agree
Evolution	People with different ideas are valued in this organization.			3	5	1	34	3.8	Agree
Evolution	I am comfortable sharing my opinions at work.			1	8		35	3.9	Agree
Evolution	My ideas and opinions count at work.			2	4	3	37	4.1	Agree
Value	Question	Strongly Disagree (1)	Disagree (2)	Neutral (3)	Agree (4)	Strongly Agree (5)	Evolution Value Score	3.7	Agree

Excellence	Poor performance is effectively addressed throughout this organization.	3	4	1	1	27	3.0	Neutral
Excellence	People are held accountable for achieving goals and meeting expectations.	2	5	1	1	28	3.1	Neutral
Excellence	I understand how success is measured	2	1	5	1	32	3.6	Agree
Excellence	I receive feedback that helps me improve my performance.	2	2	2	3	33	3.7	Agree
Excellence	We measure job performance to ensure all staff are achieving results.		4	4	1	33	3.7	Agree
Excellence	When I do a good job, I receive the praise and recognition I deserve.	1	2	3	3	35	3.9	Agree
Excellence	I receive useful and constructive feedback from my manager.	1	1	4	3	36	4.0	Agree
Excellence	This organization is extremely focused on customer needs.			8	1	37	4.1	Agree
Excellence	The quality of X Company programs and services are very important to this organization.			7	2	38	4.2	Agree
Excellence	We constantly look for ways to improve X Company products and services.			7	2	38	4.2	Agree
Excellence	I have an opportunity to participate in the goal-setting process.		1	3	5	40	4.4	Agree

Value	Question	Strongly Disagree (1)	Disagree (2)	Neutral (3)	Agree (4)	Strongly Agree (5)	Excellence Value Score	4.0	Agree
Meaningful Work	I am familiar with and understand the organization's goals as outlined in the 2017 Annual Plan.			2	3	4	38	4.2	Agree
Meaningful Work	I understand how my work directly contributes to the overall success of X Company.				2	6	38	4.2	Strongly Agree
Meaningful Work	I am familiar with and understand the organization's strategic goals as outlined in the 2020 Strategic Plan.			1	3	5	40	4.4	Agree
Meaningful Work	I feel that my work is important and has a positive impact on the organization.				3	6	42	4.7	Strongly Agree
Meaningful Work	I have a good understanding of the mission and goals of X Company				2	7	43	4.8	Strongly Agree
Meaningful Work	Doing my job well gives me a sense of personal satisfaction.				2	7	43	4.8	Strongly Agree
							Meaningful Work Value Score	4.5	Strongly Agree

*Figure 6. 2017 X Company staff survey results.*

### **Leadership and Governance Results**

X Company leaders administer a staff survey to evaluate leader communication and engagement with the workforce. X Company leaders calculate their communication results from customer emails and testimonials that customers show their appreciation for X Company's leaders and staff. X Company does not have a formal process in place to

assess senior leaders' communication and engagement with the workforce and customers. Governance accountability is also an area of improvement for X Company. X Company is subject to an annual audit and must meet compliance regulations typical of the nonprofit sector and X Company's CEO must register the nonprofit with the state each year. The nonprofit has not experienced any ethical or legal issues from employees since the CEO established the nonprofit. X Company leaders and staff are transparent in all their actions to meet the organization's mission.

X Company leaders and employees make a significant societal impact by the nature of their work in the nonprofit sector. X Company leaders set goals for program and service performance to meet the needs of key communities. X Company's CEO also grants employees the opportunity to volunteer for local nonprofits and other opportunities to make an impact in the community. X Company leaders and staff members hope to build lasting relationships with key stakeholder by exploring ways to make an impact on customers and volunteers collectively. X Company leaders use quarterly data to measure fulfillment of societal responsibilities and support of key communities; however, it is difficult to measure the effects of their work because of the complex environment typical of urban cities. X Company leaders use customer experience and feedback to determine the level of X Company's success; however, there are no societal metrics that X Company leaders and staff can evaluate to determine the level of impact. After each program or service, X Company leaders and staff ask for informal and formal customer feedback. X Company leaders and staff rely heavily on stakeholder anecdotes, stories, surveys, and testimonials to assess X Company's success in key communities. X





<b>Total</b>	<b>\$130,000</b>	<b>186,000</b>	<b>160,000</b>	<b>50,000</b>	<b>72,000</b>	<b>28,000</b>	<b>125,000</b>	<b>75,000</b>	<b>76,000</b>	<b>75,000</b>	<b>977,000</b>
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Figure 7. Cost Analysis for programs and services in 2016.

	Business Advisory &Engagement Services	Board Training & Matching	Days of Service	Program 1	Program 2	Program 3	Program 4	Nonprofit Services	Volunteer Services*	Annual Fundraising Event	<b>Total</b>
FTE	1.2	1.5	1.5	0.5	1	0.3	1	0.75	0.75	0.3	<b>9*</b>
Salary & Benefits	95,000		6,000		10,000	8,000			17,000	65,000	<b>116,000</b>
Occupancy	12,800			20,000			80,000				<b>600,000</b>
Program Expense		10,000			10,000		15,000	30,000	10,000	10,000	<b>85,000</b>
Marketing	5,000	1,000			30,000	5,000					<b>36,000</b>
Operations/ Overhead	9,000			5,000	5,000			5,000	10,000		<b>25,000</b>
<b>Total</b>	<b>\$121,8000</b>	<b>164,525</b>	<b>159,525</b>	<b>52,950</b>	<b>107,700</b>	<b>37,060</b>	<b>109,500</b>	<b>73,000</b>	<b>73,000</b>	<b>67,000</b>	<b>966,050</b>
<b>Net Contributions</b>	<b>\$8,200</b>	<b>21,475</b>	<b>475</b>	<b>(2,950)</b>	<b>(35,700)</b>	<b>(9,060)</b>	<b>15,500</b>	<b>2,000</b>	<b>3,000</b>	<b>8,000</b>	

Figure 8. Expenses for 2016.

<b>REVENUES</b>	<b>2013 Actual</b>	<b>2014 Actual</b>	<b>2015 Actual</b>
<b>Business Memberships</b>	440,000	458,000	497,500
<b>Foundation Grants</b>	118,000	97,500	88,500
<b>Individual Donations</b>	78,600	67,000	101,440
<b>Business Sponsors/ Donations</b>	69,000	115,325	79,8850

<b>Training &amp; Program Income</b>	36,000	36,740	43,8821
<b>Government Grants</b>	50,500	70,500	27,500
<b>Rental Income</b>	-	-	6,120
<b>Total Revenues</b>	<b>792,100</b>	<b>845,065</b>	<b>838,611</b>

Figure 9. X Company's total revenue 2013 to 2015.

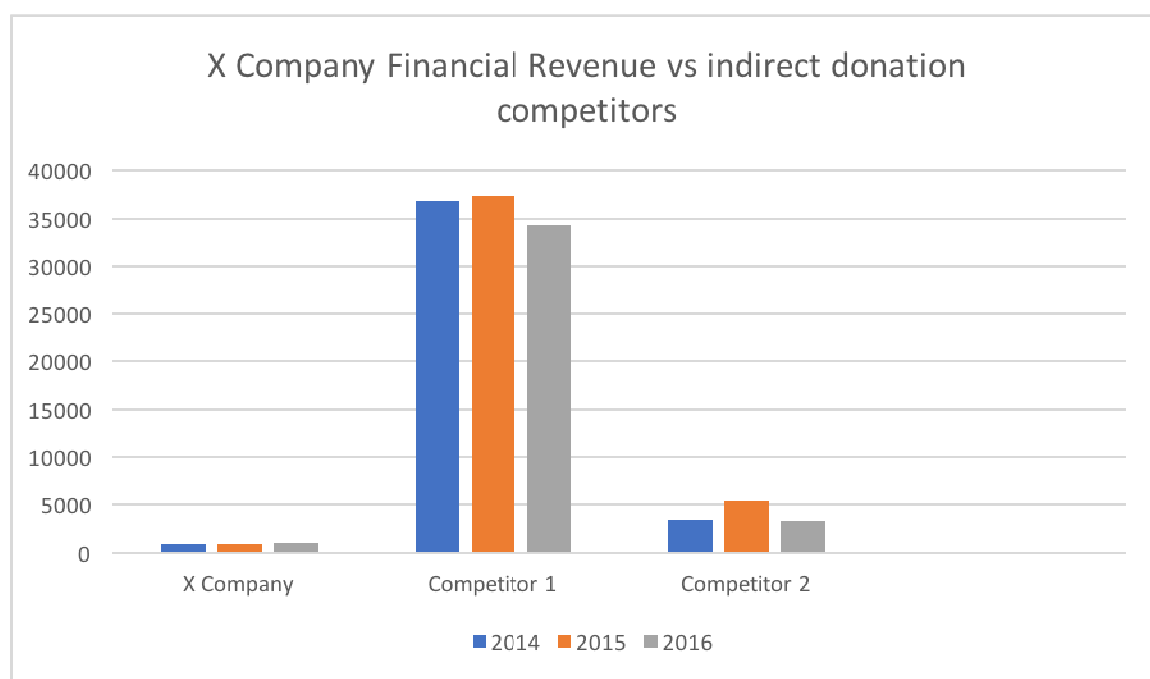


Figure 10. X Company revenue compared to indirect competitors.

X Company leaders analyze the nonprofit's sales process and the duration of time to complete agreements with clients. On average, X Company leaders and potential customers agree to terms within four months. X Company's CEO is the nonprofit's lead budgeter and manager of the budget. Another organizational leader manages business development and works with the CEO to develop budget reports for reporting to the

board. X Company experienced a decline in revenue in 2016; as X Company leaders and staff took in over \$900,000 in revenue and lost over \$60,000 (Figure 7). X Company experienced higher expenses than they anticipated. X Company leaders and staff sent out a business survey and have not received results from the nonprofit's business customers. X Company leaders will need to achieve the organization's strategic goals to obtain higher levels of revenue per year.

### **Key Themes**

**Process strengths.** X Company's leaders' strategic planning is the first theme to emerge in X Company's process strengths. X Company leaders understand that strategic planning is important to elevate and improve the organization and overcome pressing challenges. X Company leaders conducted strategic analysis and planning to understand the organization's history, achievements, market, customer trends and strengths, weaknesses, opportunities, and threats. Through a lengthy and thorough analysis, X Company leaders determined a need to improve certain areas of the organization to include: brand awareness, growth, innovation, and employee retention.

Acknowledgement of areas of improvement is key for leaders to make critical changes or sustain processes (Table 1.4). Participants 1 and 2 noted the importance of brand awareness, innovation, and growth to improve X Company strategically.

Communication is another theme to emerge in X Company's process strengths.

X Company leaders aim to establish lines of communication with employees. Senior leaders use various methods such as meetings, one-on-one check-ins, and analysis of survey results to enhance communication and maintain a connection with the workforce

(Table 3.1). The CEO understands the importance of communication to facilitate collaboration among members of the workforce.

Leaders support positive relationship building with employees when they encourage two-way communication channels (Brunetto et al., 2012). Ensuring two-way communication is critical to harnessing a leadership system within an organization because leaders partly reinforce values, ethical behavior, and performance expectations via communication (Baldrige Performance Excellence Program, 2017). Surveying employees is another strength that X Company leaders employ to create a dialogue with the workforce (Table 7.3). Clark et al. (2013) contended organizational leaders survey their employees to understand their employees and offer employees an opportunity to express their perspective. X Company leaders create a sense of belonging when they encourage employee commitment to the mission and use key performance indicators to track performance (Figure 3). Moreover, X Company leaders align with Maslow's belonging need because employees value meaningful involvement and acceptance in the workplace.

The nonprofit's leaders reinforce the importance of the workforce members' commitment to mission and enhance understanding of the strategic intent, resources availability, and functional roles to achieve the mission. Kim and Lee (2007) noted that nonprofit leaders can enhance their efforts to retain employees when their employees have a strong commitment to organizational mission. X Company leaders ensure employees understand the CEO's direction and strategic intent. To achieve the strategic goals, X Company senior leaders define workforce functional roles and communicate

how each role is an integral component of the overall assembly of functional roles necessary to achieve the organization's mission. X Company's CEO offers a description of each program and service and details X Company's competitive status (Table 1)

X Company senior leaders are consistent with the Baldrige framework's guideline that leaders can foster teamwork by focusing on a common end. X Company leaders initiate a collaborative workplace with constructive teamwork and create a sense of belonging and mission commitment to support the integration of goals. I analyzed the results of X Company's employee survey and noted employee responses to survey questions "What do you like most about working at X Company and what do you find positive about the culture/morale?" Multiple employees highlighted X Company's mission as what they like about their work. Employee 8 stated "We have a clear mission and the opportunity to make a positive impact in the community" and Employee 3 finds X Company's mission as a positive aspect of the nonprofit's culture because of everyone's commitment to the mission (Figure 7.3).

Another theme to emerge is workforce engagement. After I analyzed my data, I determined that workforce force engagement is a key strength and opportunity for improvement at X Company. I will explain why workforce engagement is a key strength and then discuss opportunities to improve workforce engagement in the Opportunity for Improvements heading. According to the tenets of the Baldrige framework, workforce engagement entails a highly-motivated workforce with the intent to achieve the utmost for an organization's clients to achieve success for all stakeholders. Engaged workforce members feel a personal connection and motivation to their work partly because of

trusting relationships, a safe and cooperative environment, effective recognition, reward systems, and leaders' support for innovation and work-life balance (Baldrige Performance Excellence Program, 2017). When employees find meaning in their work and have leadership support, employees become more involved in the workplace and reduce their intentions to leave their organization (Hong, 2012; Word, 2012).

Participant 2 stated that teambuilding sessions are essential to build camaraderie and create a supportive environment for workforce members. Participant 1 stated X Company leaders achieve workforce engagement by valuing employees' opinions concerning processes, strategic direction, innovative approaches to achieve performance results and offering work-life balance. In response to X Company's staff survey (Figure 7.3), Employee 2, Employee 4, Employee 5, Employee 6, and Employee 9 stated leaders' support for innovation and work-life balance are positive aspects for X Company. X Company leaders align with Nair and Malewar's (2013) findings that leaders can reduce employee turnover by facilitating employees' work-life balance to ensure efficiency between professional and personal commitments. According to Gatling et al., (2016) and Lee et al. (2015) findings, organizational leaders such as the leaders of X Company, support workforce members' engagement, job satisfaction, and potential to self-actualize.

**Process opportunities.** After analysis of interview data, organizational strategic plans, policies and archival documentation, emergent themes for opportunities to improve the effectiveness of key processes were (a) employee training and development, (b) advancement opportunities, and (c) strategic leadership. Workforce and leader

development processes are an opportunity for improvement for X Company. According to X Company's employee survey results (Figure 7.3), 55% of the workforce members believe they do not receive the training they need to do their job. Employees need opportunities to learn and build upon their capacity to use critical core competencies to perform their job. Leaders must assess the breadth of opportunities they offer employees for development and embed education, coaching, mentoring, and work-related experiences into a comprehensive training and development system (Baldrige Performance Excellence Program, 2017). Participants 1, 2, and 3 noted that leadership development is a critical process opportunity for improvement.

Participant 3 stated, "There is not a coordinated process for professional development or workforce development hiring is done from the outside of the organization." According to X Company's strategic plan, the CEO intends to expand the number of employees and therefore should develop current employees on staff for leadership and other advancement opportunities to avoid hiring outside of the organization as applicable. Internal career and promotion opportunities are among the indicators of high performing workplaces and an effective retention strategy (Tang & Tang, 2012). X Company leaders must ensure the success of objectives within the nonprofit's strategic plans by shifting their focus to strategic process actions to include strategy, the workforce, work systems, and assets. X Company CEO should work with subordinates and the workforce to develop standard and centralized processes for organizational accountability, workforce development, workforce engagement assessment, and emergency and contingency planning. X Company leaders use key



performance indicators to track and measure workforce performance; however, there is a need for leaders to develop internal accountability processes to hold key stakeholders accountable to achieve desired results (Figure 7.3). Accountability processes are important for organizational governance, performance, and workforce engagement (Baldrige, 2017).

X Company leaders can establish workforce development processes specific to each job to enhance workforce capabilities by developing employees and merging their knowledge, skills, abilities, and competencies to achieve strategic goals. X Company leaders should disseminate the work processes for each job to the entire workforce to boost organizational transparency and employee knowledge sharing. According to the Baldrige Performance Excellence Program guidelines, transparency is consistent, candid, and open communication by leadership, management, and employees by sharing clear and accurate information. Transparency is also a key factor for workforce engagement because employees benefit from transparency by understanding key actions and every coworker's contribution. X Company leaders encourage workforce engagement; however, without a formal workforce engagement assessment process in place, leaders cannot gauge X Company's drivers of workforce engagement thoroughly.

X Company leaders should focus on continuity of operations with consideration of technological capabilities and security. X Company leaders can ensure and manage operational effectiveness further by developing safety and emergency preparedness processes to include data and information security. Leaders of successful organizations ensure a safe and secure environment for all stakeholders by addressing risks and

opportunities they analyze from data and information security and consideration of environmental and climate characteristics (Baldrige Framework, 2017). Processes are consistent actions that leaders can evaluate and change for improvement. Leaders can ensure efficient operations by developing processes, analyzing the processes, implementing innovation, and sharing knowledge. Leaders should use formal processes with measures to track progress on key strategic and operational goals (Baldrige Framework, 2017).

**Results strengths.** X Company's results strengths are (a) external market evaluation, and (b) client retention (Table 1.4). X Company leaders maintain customer engagement to support the organization's market success by providing customers a voice to understand their expectations (Table 3.1). According to X Company's customer NPS score results (Figure 5), X Company leaders and staff have a net 80% or above for programs and services. X Company leaders use the NPS scores to measure customer experience and make critical decisions for customer satisfaction, customer engagement, and organizational growth.

Since 2013, X Company leaders and staff have maintained a steady growth of clients and volunteer participation (Figure 2). X Company leaders and staff have also increased partnership revenue over a 4-year period (Figure 7.5b).

X Company leaders and staff members build strong relationships with existing customers and maintain lines of communication and access for potential customers. X Company leaders evaluate the external market to understand customer satisfaction and seek opportunities to compare data to competitors to enhance X Company operations.

X Company leaders and staff give value to partners and maintain client retention rates over time. X Company leaders promote the retention of members to exceed 87% for member retention. Senior leaders have the organization on track to reach the strategic plan's 90 percent retention rate (Table 4).

**Results opportunities.** Though X Company leaders and staff members maintain steady revenue from partnerships, there is a need to reduce X Company's expenses and boost revenue to obtain leaders' partnership revenue goal of 60% in alignment with the goals of the organization's strategic plan (Table 4). Participant 1 noted that X Company experienced higher expenses in 2016 than leaders anticipated. To increase revenue, X Company leaders and staff members must increase the number of program participants, increase the number of volunteers and partnerships, and boost clients' service utilization. According to X Company's dashboard results, there is a potential risk to fail to achieve leaders' goals for programs that leaders and staff use to generate revenue (Figure 3).

X Company leaders should boost social media engagement by creating and increasing the number of X Company paid ads on social media for programs and services to reach more program participants, volunteers, and clients as part of the organization's brand awareness goal. X Company leaders must improve how they measure, improve, and implement X Company's employees' opportunities for engagement, and learning and development. According to X Company's staff survey results (Figure 7.3), Employee 4 noted a lack of opportunities for staff collaboration, resource sharing, and idea exchange among the workforce. Employee 4 also indicated that leaders' support personal autonomy and personal accountability for work streams would help X Company improve

workforce engagement and learning. Employee 5 mentioned the need for leaders to include staff members in critical decision-making situations more often. X Company leaders should add specific workforce engagement questions to the staff survey and add workforce engagement, learning, and development to the organization's strategic plan and develop key measures and performance goals.

### **Project Summary**

Nonprofit leaders need a dedicated workforce to achieve their organization's mission. However, nonprofit leaders must meet the needs of their workforce to assuage voluntary turnover intentions and gain employees' commitment to the organization. Employee turnover is a significant challenge that leaders must overcome because they often rely heavily on human capital to accomplish strategic results through programs and services (Walk et al., 2014). In this case study, I analyzed how leaders of a nonprofit located in the Washington, DC area have used certain strategies to reduce employee turnover. Nonprofit leaders can use the data I have assembled in this single-case study to develop and implement effective strategies to satisfy their employees' needs and improve retention.

Understanding employees' diverse needs is a key aspect of effective retention strategies. Leaders are in a better position to motivate their employees and enhance operational production and economic performance with dynamic employee retention strategies in place (Vasquez, 2014). Committed nonprofit employees find motivation from the intrinsic satisfaction of applying their knowledge, skills, and abilities to resolve dire social issues for communities in need. Despite nonprofit employees' intrinsic

orientation, nonprofit leaders must understand the effect low compensation, excessive workloads, burnout, and employment uncertainty and many other organizational aspects may factor into employees' turnover intentions (Baines et al., 2014). Leaders must take advantage of opportunities to listen to employees to understand their needs.

Participants in this study offered a substantial amount of information about their efforts or their organization's leaders' efforts to reduce voluntary employee turnover. The findings in this study are significant for leaders who need to connect with their employees and win their commitment to their organization. Leaders use effective retention strategies to retain key employees and alleviate the causes of voluntary turnover (Deeba et al., 2015). Leaders can use retention strategies that entail satisfaction of employees' physiological needs, security needs, belongingness needs, esteem needs and their need to self-actualize. One's needs and internal motivation are key factors to understand because needs and motivation are critical drivers of one's willingness to perform desired behavior when one has an opportunity to satisfy needs (Clegg et al., 2016). Nonprofit leaders should satisfy the needs of their employees thereby enhancing their employees' capability and capacity to creating positive social change in key communities. Organizational leaders can take advantage of the themes in this study to understand their employees and fundamental aspects associated with effective retention strategies. Word and Sowa (2017) noted the importance of nonprofit leaders use of retention strategies to influence employee experiences and achieve desired organizational performance results in the nonprofit sector.

The results are an indication of the participants' experience with employee retention, and the systematic approach leaders can take to address employee turnover. Participants offered data on key organizational characteristics essential to organizational performance to include: leadership, strategy, customers, analysis, knowledge management, workforce, and operations. Leaders who review the data in this study may gain valuable insight into a comprehensive approach to analyzing their organization and workforce needs to develop and implement strategic employee retention strategies. In this study, I demonstrated the necessity for organizational leaders to evaluate and fulfill the needs of their workforce, attain workforce commitment, and reduce voluntary turnover to accomplish organizational goals. Leaders who use the results of this study to implement retention strategies may improve their organization's performance, reduce voluntary employee turnover, and become more competitive.

### **Implications for Social Change**

The implications for social change include a positive impact that nonprofit leaders may achieve potentially by enhancing their organizations' capability and capacity to achieve unique social missions. In the nonprofit sector, retention of an intrinsically motivated and determined workforce is critical to creating positive social change and beneficial outcomes for all stakeholders in key communities. An effective employee retention strategy is pivotal to meaningful social interactions between volunteers, business professionals, key communities, and nonprofit employees. Nonprofit leaders must understand their employees' needs and establish employee retention strategies because their employees commit to satisfy external stakeholders' needs. Nonprofit

leaders and employees provide valuable programs and services that external stakeholders depend on for assistance.

Therefore, nonprofit leaders can ensure the well-being of all internal and external stakeholders by creating effective retention strategies to reduce employee turnover. Nonprofit leaders can use the retention strategies in this study to retain a capable and committed workforce. Nonprofit leaders may find value in the findings of this qualitative single-case study because of the insight they may gain to enrich their employees who strive to help communities. Nonprofit leaders can also use the research data and findings of this study to evaluate their organization systematically in their efforts to create effective processes for above average performance.

### **Contributions and Recommendations**

The results of this study are an indication of the priority organizational leaders should place on developing effective employee retention strategies. After analyzing my participants' organization systematically and exploring retention strategies organizational leaders used to reduce voluntary employee turnover, I offer recommendations for leadership action. First, organizational leaders must develop standardized processes for critical strategic goals and functions within their organization.

Standardized processes are the lifeline of strategic plans. Leaders should establish workforce processes to streamline individual functions and ensure efficient use of resources and core competencies to enhance organization-wide capabilities. Nonprofit leaders should implement standardized processes to address key strategic goals or issues, ensure the processes are relevant, repeated consistently, learn from the processes, and

innovate and integrate the processes with other organizational processes, functions, and goals. Second, nonprofit leaders should implement multiple organization-wide employee performance review counseling throughout the year.

Nonprofit leaders should conduct a brief formal performance review counseling with each employee every three months and one thorough review annually with each employee to assess employees' cumulative performance throughout the year. During each performance review and counseling session, nonprofit leaders should seek to understand employees' personal and professional needs. Nonprofit leaders can use the performance reviews to enhance two-way communication, provide feedback on employee performance, enforce accountability to performance measures, and understand employees' needs to help them achieve desired performance. Nonprofit leaders can communicate their expectations and employees can communicate their needs and expectations. Nonprofit leaders should thoroughly document each review and counseling for meticulous recordkeeping. Third, nonprofit leaders should develop a basic career path for nonprofit employees based on internal career mobility, advancement, and training. Notably, nonprofit organizations tend to have limited jobs, small workforces, and flat structure.

Nonprofit leaders should develop a formal system or program to ensure employees have opportunities to gain knowledge, engage, and use their abilities in various positions, special projects, and initiatives throughout their employment. Nonprofit leaders should define a clear career path by aligning tenure with advancement, formal training, and development. Last, nonprofit leaders must consider how their



actions and decisions affect voluntary employee retention. Organizational leaders are the most critical aspect of retention strategies because leaders' actions and decisions affect workforce satisfaction and commitment. Nonprofit leaders should implement employee retention strategies they can use to build trust, positively influence organizational culture, enhance communication, develop the workforce, and satisfy employee needs.

Qualitative researchers should conduct further research by using the case study design and multiple nonprofit organizations. I recommend qualitative researchers use a large sample size of participants from various nonprofit sectors. Researchers can explore effective retention strategies that organizational leaders can use to retain a gender or racially diverse workforce. I recommend researchers use quantitative and qualitative research methods to gain further understanding of the effectiveness of specific retention strategies in the for-profit and nonprofit sectors.

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Appendix A: Interview Protocol

Doc Study Interview Protocol

Date and time: \_\_\_\_\_

Participant (Title and Name): \_\_\_\_\_

Introduction and state the topic of the interview:

Section of Baldrige Framework and subsequent questions:

\_\_\_\_\_ 1: Organizational Profile

\_\_\_\_\_ 2: Strategy

\_\_\_\_\_ 3: Customers

\_\_\_\_\_ 4: Measurement/Processes

\_\_\_\_\_ 5: Workforce

\_\_\_\_\_ 6: Operations

\_\_\_\_\_ 7: Results

Data collection and note taking:

Other Topics Discussed: \_\_\_\_\_

\_\_\_\_\_

Documents Requested?: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Post Interview Comments or Leads:

\_\_\_\_\_

### **Research Question**

The research question for this study is as follows: What strategies do leaders of nonprofit organizations use to retain their workforce?

### **Interview Questions**

1. What strategies do you use to retain your workforce?
2. What were the key barriers to implementing your organization's strategies for employee retention?
3. How did your organization leaders address the key barriers to implementing strategies for workforce retention?
4. How did these implemented strategies help you hire and retain your key employees?
5. How do you assess employee needs in your retention strategies?
6. What more would you like to share about the strategies you use to retain your workforce?