

# **SENSING, LEARNING, AND RECONFIGURING**

**IN NONPROFIT ORGANIZATIONS:**

**BUILDING CAPACITY AND  
RESPONDING TO CHALLENGES  
THROUGH THE DYNAMIC-  
CAPABILITIES FRAMEWORK**

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A Capstone paper in fulfillment of the requirements for  
the degree of Doctor of Education in Leadership and  
Learning in Organizations

**PEABODY COLLEGE OF EDUCATION  
AND HUMAN DEVELOPMENT**

**VANDERBILT UNIVERSITY**

**NASHVILLE, TENNESSEE, USA.**

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Organization: Georgia Association for Gifted Children

Summer 2021

**VANDERBILT**  **UNIVERSITY**



# ABOUT THE AUTHOR

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# ACKNOWLEDGEMENTS

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I want to first acknowledge my amazing wife, Melissa Galindo. You have shown me, unconditional love, throughout this entire process, whether it was long nights or early mornings, you never once hindered me from giving it my all to complete this degree. You have seen me at my best and worst, but regardless of the moment, you were there by my side encouraging me. We sacrificed what we had to do in order to make it work and those sacrifices have only made us stronger together. Your love in the hardest of times was all I needed to get me through to fight another day. We have come a long way, Corazon. There is no one else I would rather have by my side. Thank you for loving all of me.

To the various mentors I have had throughout my life, thank you! From an early age, there were individuals placed in my life who saw something more inside of me. You all cultivated those talents out of the goodness of your heart. I have been able to experience life-altering opportunities that put me on a completely different trajectory. A trajectory I thought I was not worthy of receiving but was right where I needed to be. Know that a part of you always lives in my heart!

To my family, thank you for never leaving my side. You were at every event, regardless of the significance, cheering me on. I always had the largest cheer section in the stands and at home. As a first-generation college student and the oldest sibling, I ventured into paths completely uncharted. Whether it was internships away from home or studying abroad across the globe, you all were always there to support me on my many adventures. You supported my decisions even when others thought I was wrong. Your unwavering support is what allowed me to aim higher and higher, knowing that I would have you all there to catch me if something ever happened. To the special ladies in my life, Grandma Lucy, Momma Linda, Tia Lela, and Patty, you all taught me perseverance and resilience. The importance of family unity and having a relationship with the Lord. Your love and prayers were all I ever needed as I faced each obstacle in my life. We are changing family narratives one degree at a time. I love you all more than you could ever know.

To Blas and Gracie, most people search all of their lives for family. I am grateful and blessed that you all love me as one of your own. You have always helped Melissa and me when we needed it most. Your support and encouragement along the way have been priceless. I never take your words of wisdom for granted. Thank you for allowing me into your life, you all have raised a phenomenal woman and I am lucky I get to call her my wife every day.

To Cohort 4, thank you for leaning in and allowing me to lean on you all as well. We have laughed, cried, demonstrated our passion, and grappled with every possible topic. I believe that vulnerability is one of the greatest measurements of courage and the amount of courage I saw from each of you all during our time together allowed me to continue to find who I was and wanted to be in this world. I am honored to have been able to study alongside you all. Your gifts are truly something spectacular and I have no doubts that we have the capacity to change this world.

To my Where's Wilma partner, Emily. Thank you for being such an inspiration and a foundation for me these last several years. What started as a check-in activity became the catalyst that would lead us to take every doctoral class together as well as tackle one of the most challenging tasks I have experienced to date as a team. You have grown over the years into a force to be reckoned with. We constantly sharpened ourselves in the process, peeling back the layers society forced us to create. Thank you for seeing me, all of me, and for accepting all aspects of my identity. I am forever grateful that our paths crossed all those years ago.



# ABOUT THE AUTHOR

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# ACKNOWLEDGEMENTS

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I would first like to thank my partner in life, my anchor, Matthew Farina for his support throughout my doctoral coursework. We have come a long way since Oxford, Maddie! I cannot think of a more compassionate human on the planet, one who knows my needs, desires, the dreams of my heart and the never ending stream of dreams from my mind. Your willingness to meet me where I stand, and often where I trepidatiously hide in the corner, is a testament to the beauty I see in you and that you share with others even when you do not know it. Thank you for helping me find my courage, my bravery, my passion.

To my daily-grind colleagues, thank you for your patience as I ran headlong into this journey without pause. This process, of becoming my best self, has often taken me away from the classroom, meetings, lunch sessions, and those culture-building conversations that are so critical to our community. Thank you for knowing that my personal journey is just as important as my professional journey. In particular, Gibson and Cleveland, you two brilliant women have my heart. No matter where we will be in the future, I owe you more than you may ever realize and I thank each of you for your uplifting presence in my life.

I would also like to thank Vanderbilt Cohort 4. Specifically, I would like to thank those individuals from our cohort that have spent many a class and post-class texting and sensemaking together. I will always cherish our moments of personal and professional joy shared together in the virtual space and I will regret the many moments we were unable to have in-person due to the chaos of our planet. You all are my family, my motivators and the change agents of our world, and for that, I am immeasurably grateful. We did it!

Additionally, I must celebrate and thank my AP Capstone family. Just when I think I am down and cannot get back up, you all pull me up, dust me off, and remind me that when we rise so do our students and our colleagues. Thank you for your time, the gifs and memes, the plants and tea, the cheering from all corners of the globe that lifted me from so many moments of near-falter. You all are a constant reminder of why this work is so important for the future of our world. I look forward to continuing our mission together of asking more questions than we have time to answer. Kaizen, my friends.

To my parents, your kiddo has done it again. This was a tough journey for sure, but your willingness to watch and wait for me to ask for help, guidance, and love has been a comfort throughout this process. I am not sure what the future holds for your pink-rain-boot-wearing, flower-loving, hypervigilant and hyper questioning, globe-trotting child, but I hope it is magnificent and makes you proud. Thank you.

Finally, to my Waldo, my cohort companion, Josh. We made it, friend. Through the ups and downs, the many rejections that we both know will eventually lead to “yes,” we have made it. Thank you for your time and energy, your focus, your diplomacy, and every single honest conversation we have ever had about our world and how we sometimes can’t quite find our place in it just yet. Let that light shine through, my friend and brother-of-heart. Let’s go change the world.

To my friends, family, and greater community: As we feel the march of time progress, I wish to bring our attention to Manuel-Miranda’s haunting reminder, “History has its eyes on you.” We must continue the work of many lifetimes, to come together to welcome more voices and faces to a table that has yet to be seen in our democracy.

Anchor down!



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# I. Executive Summary

The Georgia Association for Gifted Children (GAGC) is a nonprofit organization with the mission to *advocate for gifted children and youth by working with educators, parents, policy-makers, and the community to meet the needs of the gifted* (GAGC, 2021). GAGC has a successful history of supporting gifted students and their school communities throughout the state of Georgia; yet, as the gifted education landscape continues to evolve, moving such an influential organization forward is no small feat. This mixed method evaluation served to catalog GAGC’s current capacity among their leadership structure and explored how GAGC can develop more routine systems related to their capacity to identify, understand, and adapt their approach when presented with challenges that, if left unresolved, could damage the community they have volunteered to serve.

## *Problem of Practice*

GAGC’s history as an advocacy group for gifted students has allowed the organization to gain a leading reputation among educators as well as legislators across the state of Georgia. As a result, GAGC has encountered little to no competition from other nonprofit organizations in the gifted education sector. However, as gifted education continues to grow in complexity and diversity, GAGC faces competition not against other organizations but against challenges that threaten the success of gifted students. Without systems in place to generate organization-wide responses to challenges, the Executive Board struggles to meet these challenges at state-wide capacity. Therefore, this study sought to explore the problem of capacity building for leadership among the Executive Board as they rise to meet the challenges presented in the gifted education landscape.

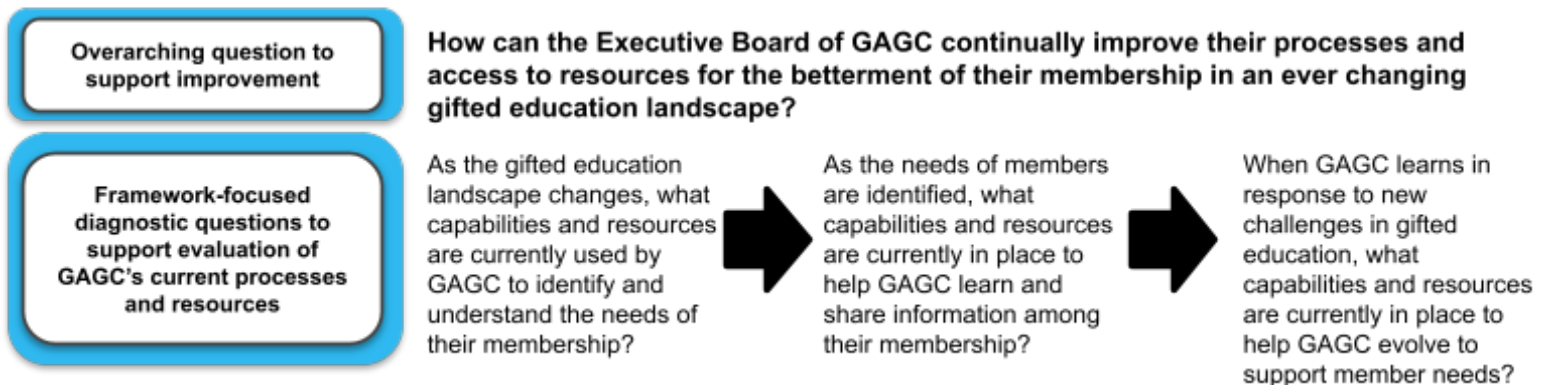
## *Conceptual Framework*

This evaluation utilized the Dynamic-Capabilities Framework (DCF) and Resource-Based View (RBV) to guide data collection and analysis. DCF focuses on the current systematic processes GAGC leverages when attempting to sense, learn, and reconfigure in response to external challenges. RBV focuses on identifying GAGC’s most valuable, rare, and inimitable resources as well as how organizationally efficient GAGC utilizes these resources. Coupling DCF with RBV allowed for the identification of processes and resources GAGC currently employs. Additionally, this coupled framework provided the template to determine how GAGC can transform their systematic capabilities to meet the needs of and challenges presented to members and the greater gifted community.

## *Project Design*

To better understand how GAGC currently meets the needs of its members, this study applied a mixed-method approach to gather both qualitative and quantitative data from the various stakeholder groups of GAGC. This evaluation sought to provide findings to a primary and three secondary research questions using data gathered from cognitive interviews, leadership questionnaires, focus groups, scaled forms, and member surveys. Additionally, triangulation of data allowed for a more comprehensive view of the organization’s current status as well as generating the most effective recommendations for the future of GAGC.

## *Research Questions*





## SENSING

### FINDINGS

The Executive Board self-reported being the least effective and systematically recognizing changes in gifted education and routinely monitoring their ability to respond to these changes.

While the Executive Board expends energy to maintain high volumes of connections to external organizations, this energy does not consistently result in member support due to the limited management of these connections.

### RECOMMENDATION

Develop a system that allows the Executive Board to routinely collect data which will identify challenges in gifted education as well as the needs of their members.

### RESOURCE

Leverage the large volume of external organization relationships identified to support in the recognizing and monitoring of challenges.



## LEARNING

### FINDINGS

The creation and acquisition of learning processes is non-systematic; therefore, the sharing of knowledge is a daunting task for the Executive Board.

Based on the reputation of the Executive Board, members feel that GAGC is an influential learning resource for teachers throughout the state; however, this influence is limited beyond their annual conference.

### RECOMMENDATION

Create codified processes in place to routinely acquire and share knowledge routinely across the entire Georgia Gifted Community.

### RESOURCE

Leverage the networking capacity of the Executive Board to form impactful, internal relationships within the Georgia Association for Gifted Children.



## RECONFIGURING

### FINDINGS

The Executive Board self-reported being highly effective in managing the creation and integration of new processes; however, the lack of routine, systematic recognition and monitoring of changes in gifted education hampers their drive to add new processes.

Limited understanding regarding the role of leadership in managing small NPO capacity building will affect the Executive Board's ability to create and integrate new processes in response to external challenges and/or member needs.

### RECOMMENDATION

Restructure and blueprint Executive Board Roles in an effort to build managerial capacity of each leader when responding to challenges in gifted education and needs of the larger membership.

### RESOURCE

Leverage the reputation of GAGC's Executive Board to recruit additional volunteer leaders focused on serving the shared vision of the organization.



## II. Introduction

Small nonprofit organizations (NPO) are critical to the communities they serve. Often comprised of a volunteer workforce, small NPOs experience strain due to limited resources of time and energy. Most NPO leaders balance various responsibilities in addition to their role within the NPO. As a result, tasks related to organizational growth and impact often fall to the key leaders who are willing to overextend themselves for the cause of the organization. This juxtaposition, of little time and large goals, leaves small NPOs volunteers conflicted, as many individuals may wish to increase impact in the communities they serve, but these same individuals may not have the resources to do so.

Our goal in this Capstone is two-fold. First, we hope to support a high-impact, small NPO to become evermore efficient and effective in their approach to supporting their members and greater community. Second, we wish to explore how nonprofits can learn from the strategies and techniques often utilized in the for-profit sector. We hope to demonstrate that utilizing the strengths of both sectors can actually create a third dimension of improvement, where smaller NPOs can maintain their heartfelt, vision-driven missions while operating with the responsiveness akin to for-profit organization when presented with challenges that threaten the communities they cherish and protect.

### **Georgia Association for Gifted Children**

The state of Georgia currently supports 1,719,573 students in public education. Of those students, 11% of learners have been identified as Gifted (Georgia Department of Education, 2020). A gifted student in Georgia is defined as “a student who demonstrates a high degree of intellectual and/or creative ability(ies), exhibits an exceptionally high degree of motivation, and/or excels in specific academic fields, and who needs special instruction and/or special ancillary services to achieve at levels commensurate with his or her abilities” (GAGC, 2020). These students are





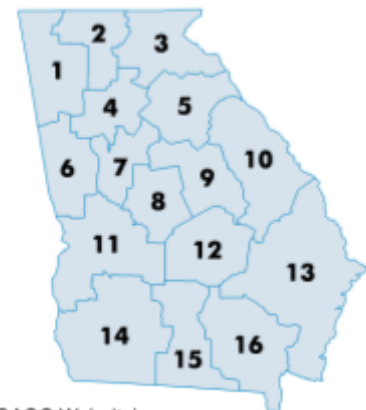
supported by certified teachers of Gifted Education when in the classroom; however, when considering the gifted community at large, the small non-profit Georgia Association for Gifted Children (GAGC) acts to protect and continue to grow gifted education for students, teachers, and administrators throughout the state.

GAGC expresses that their purpose is to:

- Promote an awareness of the needs of Georgia's gifted students.
- Stimulate among educational administrators, teachers, parents, legislators, the business community, and others of the general public, a deeper understanding of and interest in the needs of the gifted.
- Provide a forum for the exchange of information and ideas among the organization.
- Encourage and stimulate the best possible training for gifted educators.
- Encourage and stimulate research in the area of gifted education, particularly in the State of Georgia

GAGC has become, since its inception in 1977, the leading NPO to support gifted students across all sixteen regions in the state of Georgia (see **Figure 1** for clarification regarding regional divisions). This NPO continually works with key government agencies to provide fiscal support and generate visibility for gifted education. One example of this push for visibility is the annual renewal of a Governor-appointed gifted education month each January (GAGC). In their quest “to advocate for gifted children and youth by working with educators, parents, policy-makers, and the community to meet the needs of the gifted,” GAGC works to ensure that administration and building leaders know how to coordinate gifted education efforts and that teachers are provided professional learning opportunities to support students in their classrooms (GAGC).

**Figure 1.**  
GAGC's regional system for providing support and assigning representatives.



(GAGC Website)



## Current Challenges in the Gifted Community

GAGC's advocacy mission aims to tackle challenges that the gifted community of Georgia routinely faces. According to a study led by Education Week Research Center (2019), in their national survey of Gifted teachers and school leaders, the following concerns are at the forefront of Gifted Education (p.4):

- definition of giftedness and candidate screening
- uneven equity in gifted classroom demographics
- providing gifted services in the gifted classroom
- staffing for gifted classrooms
- variation in approach based on district demographics and needs

This report indicates that Georgia's gifted classrooms are not exempt from these challenges.

Therefore, it is vital that GAGC effectively acts as the organization that works to understand the complexities of these challenges and moves to mitigate these issues for their members throughout the state of Georgia.

At the start of our collaboration, GAGC leadership identified that they do not possess the organizational capacity to investigate and understand these national issues as they pertain to their members; however, they are incredibly eager to attempt to tackle such a feat. While there are over thirty regional representatives in place throughout the state, most of the initiatives currently spearheaded by the organization are driven by the sensemaking of the twelve-member Executive Board. Without a system that supports and works with the organization state-wide, GAGC will continue to struggle in their attempts to diminish the effects of challenges identified by their membership. Thus, working to support GAGC will not only change the ways in which the organization will operate, it will also influence over 1,000 teachers and administrators in their charge to serve gifted students throughout the state of Georgia.



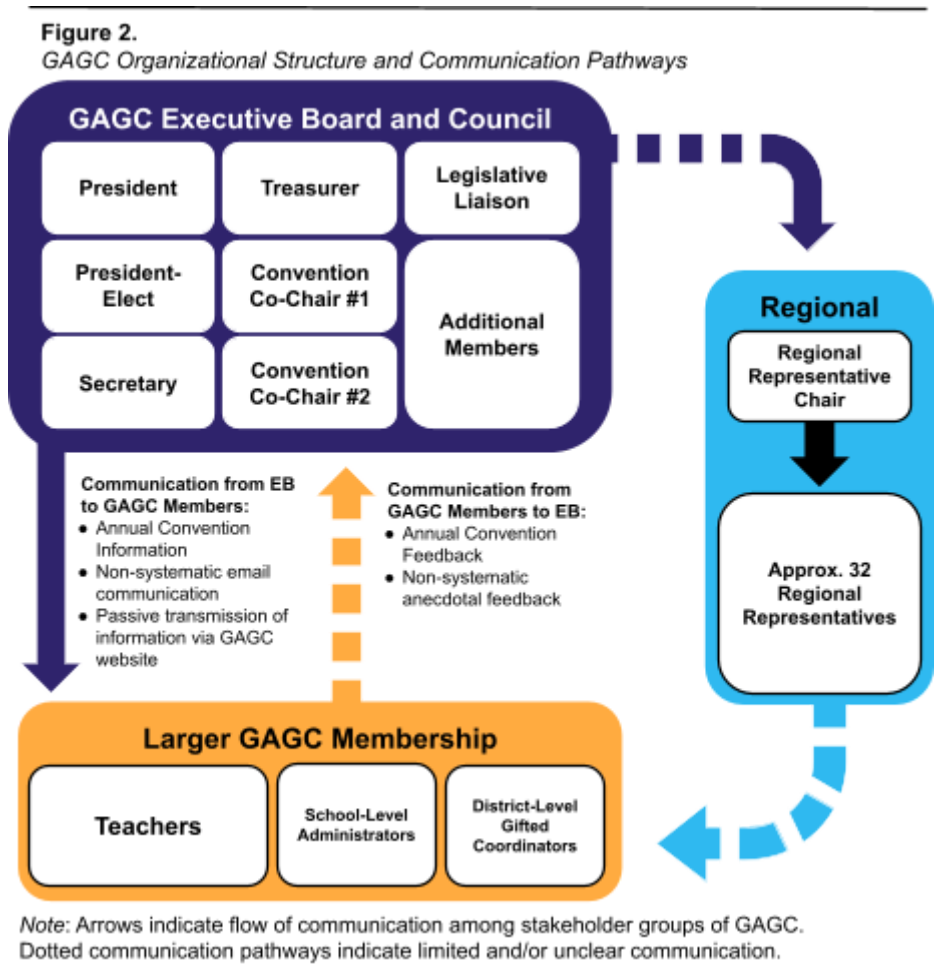
### III. Organization Context

#### GAGC's Current Organizational Structure

GAGC is currently organized into three major stakeholder groups. Leadership of GAGC are categorized as Executive Board officers, who operate as the major decision makers of the organization. Regional

Representatives serve as support for their assigned districts, tasked with communication and training to meet the needs of teachers and leaders in their area of Georgia.

The larger membership are teachers and leaders throughout the state who do not serve in formal roles, but are paying members of the organization. To view communication pathways of GAGC's three major groups, please reference **Figure 2**.



#### Executive Board

GAGC currently has roughly twelve volunteer members, spread throughout the state of Georgia, who belong to the Executive Board. While this leadership team is by no means small for their overall membership size, much of the decision making occurs within this group. Additionally, there are committees that serve the Executive Board, but these were not discussed in preliminary conversations as influential entities and are, therefore, not part of the overall discussion regarding



organizational structure. As the Executive Board operates as a unit rather than as individual roles, much of our discussion in this paper focuses on the collective impact of the Executive Board on the growth and success of GAGC. Individual officer roles of the Executive Board are outlined in the bylaws and presented in **Appendix A**.

With no centralized location to host organic conversations, the Executive Board must rely on organizational processes to assist them in completing state-wide initiatives (e.g. annual state conference, legislative bill around student rights and funding, and training new gifted teachers and administrators). During quarterly meetings, this leadership team operates from a series of bylaws, available to their members via the GAGC website, that outline tasks and roles for maintaining the organization. The Executive Board controls most decision making processes regarding organizational spending, resource building, and communication with legislation.

While maintenance processes are clear, there is not a clear picture regarding the influence of the Executive Board on growth and change of GAGC as it meets the needs of members. This proves problematic as the shared vision and mission discussed previously will require this small NPO to not only maintain their status as an influential organization in Georgia education, but continually increase their presence for the gifted community of Georgia. During preliminary discussions with the Executive Board, officers reported that they approach much of their efforts in an insulated fashion, with very little help from GAGC members outside the Executive Board. Therefore, it appears that the Executive Board often overextends their own time and energy to meet the demands of the larger membership.

### *Regional Representatives*

GAGC currently has approximately thirty-two rotating regional representative positions. Individuals nominated to these roles are expected to coordinate and provide resources to their sixteen respective gifted communities (see **Figure 1** for clarification regarding regions). GAGC's website indicates that Regional Representatives are tasked with the coordination of communication,



training for their specific regions, networking with teachers, and communication with parents of gifted students (GAGC website).

The strategy for supporting each region is unclear and, after discussions with the Executive Board, it seems that many of the Executive Board members also operate in the capacity of a Regional Representative, coordinating and providing resources directly to members. Additionally, these positions can stay vacant for months at a time, drawing attention to the lack of a pathway to promote new leadership into positions. Due to a lack of systematic processes, the responsibilities delegated to the Regional Representatives often fall upon the Executive Board in addition to their responsibilities as leadership of GAGC, further increasing the time and energy required by Executive Board members to achieve their vision and mission.

### *Larger Membership*

GAGC's roughly 1,100 person membership serves gifted communities throughout the state of Georgia. This portion of the organization includes teachers, administrators, and district-level leadership for many of the school systems in the state of Georgia. To become a member, one need only to pay dues, but most individuals gain membership by paying fees for the GAGC Annual Conference. Additional time and effort commitments are non-existent for this portion of GAGC members. Members are encouraged to vote for GAGC leadership, but that is not a requirement to maintain member status.

Each region, as indicated in **Figure 1**, holds various needs based on student demographics and support of gifted classrooms. Benefits of membership, regardless of role in the gifted community, include: scholarships for Gifted Endorsements, legislative updates, and professional learning in the form of the annual conference. Without major emphasis on routinely gathering the needs and soliciting organization-wide feedback from their members, leadership is not currently capable of



systematically sensing the challenges of this larger membership, and at the moment, operate on anecdotal needs when members reach out to the Executive Board.

### **GAGC's Operations of Support**

GAGC operates under the premise that serving the teachers and leaders of districts will ultimately serve the students. This trickle down effect of professional learning and development, as well as legislative influence, work to generate outcomes that aim to provide more equitable and accessible classrooms for Georgia's gifted students. GAGC's largest operation is their annual convention, in which teachers and leaders from across the state come together to learn from one another as well as major leaders of gifted education. Due to the large focus on the annual conference, many of the additional operations are focused on maintaining the status of the organization and not on forward-thinking strategy outside of the annual conference.

### **Stakeholders of Capstone Research**

Our research team collaborated with the Executive Board, in particular the President and President-Elect of GAGC, to explore their current operations and systems for meeting the needs of their members. With a President-elect positioned to move into the role of President at the time of this study, we were able to work closely to understand their wants and needs to determine their potential influence on the organization as whole and the operations of the Executive Board. Additionally, we worked passively with the larger membership, asking questions to understand their satisfaction and needs when supporting the gifted community.

### **Projected Capstone Outcomes**

Our research aims to help support the Executive Board in building systems to capture their high-quality abilities into more consistent processes which will positively impact the larger membership and greater gifted community. We hope to help shift this organization from a system of maintenance to a system of proactive gifted professionals, leveraging the entire organization's



abilities rather than the few who have been elected to leadership positions. Our desired outcomes, regarding systems generation, are the following:

- Generate systems in which the Executive Board can routinely collect and understand their member needs as well as identify challenges within the gifted community
- Generate systems in which the Executive Board and Regional Representatives can work together to learn how to best support the larger membership (i.e. professional development, leadership training, etc.)
- Generate systems to help reshape processes and roles as the organization responds to needs based on challenges presented to the gifted community.



## IV. Problem of Practice

The Georgia Association for Gifted Children (GAGC) depends on their Executive Board, a leadership team built of dedicated volunteers, to provide state-wide support for the gifted community of Georgia. As GAGC's Executive Board is stretched to capacity, there is little space for discussions or action revolving around strategy and response to challenges in gifted education. Rather than the entire organization working together to conquer problems in the gifted education landscape, current organizational initiatives are often reactionary causing the overextension of one or two members of the Executive Board. This method of supporting the NPO's community is problematic, as GAGC may generate burnout among key members of the organization, potentially resulting in stagnation of GAGC's influence in the state of Georgia. Additionally, when problems that appear insurmountable are presented, GAGC may not have the current capacity to overcome these challenges and if these challenges are left unchecked, members of GAGC may begin to look to other NPOs for support.

Therefore, the problem of practice focuses on the lack of systems in place that would support the Executive Board in leading organization-wide responses to challenges in gifted education. While the Executive Board has a system of rules for meetings and proceedings, the organization does not currently have systems in place to routinely understand the potential challenges faced by Georgia's gifted community, develop procedures to respond to these challenges, and then adjust organizational processes to extinguish threats to Georgia's gifted classrooms. The organization has requested assistance to develop manageable processes to:

- 1) identify the current challenges and needs of members,
- 2) most efficiently leverage resources available to the organization to address identified needs, and
- 3) formulate, implement, and assess the effectiveness of the organization's capacity to respond to current challenges in the gifted education landscape.

In order to meet this organization's needs, this Capstone study will seek, through a mixed





methods approach, to understand the current organizational processes and systems in place, types of available resources, and current challenges of members. We then work to generate recommendations to improve GAGC's processes and overall system for supporting gifted classrooms across the state of Georgia. As *capacity* and *capabilities* are so closely intertwined, please note that this paper uses the two words interchangeably.



## V. Literature Review

GAGC's Executive Board reported a need to further develop their capacity to handle external challenges in the gifted education landscape. As GAGC is a smaller NPO, this need is further exacerbated by the finite resources of the talented, all-volunteer leadership team, of which many individuals have high pressure positions in their full-time employment. Understanding the nature of building capacity in NPOs, as well as addressing the unique needs of NPOs, connected directly to our work with GAGC; therefore, we explored the literature of NPO capacity building, specifically focusing on the role of leadership in building and sustaining multiple factors associated with building and managing organizational capacity. Additionally, looking outside of the NPO space for potential models for capacity building in the for-profit sector aided in our understanding of how to innovatively work with the GAGC Executive Board.

### **Capacity Building in Organizations**

Capacity building is grounded in identifying and understanding the needs of an organization as it attempts to grow in service to members or consumers. Capacity building is the process in which an organization works to achieve their shared vision by leveraging a collection of resources and systems in response to external challenges (Kim & Peng, 2018; Isett et al., 2011; Da Vita & Fleming, 2001). As identified and described previously, GAGC may have operations for maintenance of their organization, but their goal of building capacity needs support if they wish to continue to grow as an influential NPO across the state of Georgia.

The approach to capacity building varies from organization to organization depending on their specific needs. Therefore, challenges may arise that are specific to a single organization. (Light & Hubbard, 2004). Leaders of organizations seeking improvement must identify and focus their efforts if they wish to tackle the challenge of capacity building in their NPO. Minzner, Klerman, Markovitz, and Fink (2013) organize capacity building into five major categories:



- 1) Managerial (governance, finance, and systems);
- 2) programmatic (e.g., implementation, monitoring, assessment);
- 3) revenue enhancement (e.g., fundraising, donor relations, developing earned income streams);
- 4) leadership development (e.g., volunteers, employees, and community members); and
- 5) community systems (e.g., asset mapping, building collaborative networks).

As we worked directly with the leadership of GAGC, we focused mainly on the managerial efforts of an NPO and how the capacity building of the GAGC's Executive Board affects the greater membership. However, based on preliminary conversations, and as outlined previously, the Executive Board works to support all of the aspects of capacity building identified by Minzner et al. (2013). Therefore, while managerial capacity building is the primary focus of our study, to analyze the impact of the Executive Board in action, it was critical to explore the convergence of managerial capacity alongside that of leadership development and community systems.

### **Leadership's Role in Nonprofit Capacity Building**

Due to the Executive Board's direct influence on the well-being of the entire GAGC membership, we sought to gather and understand literature surrounding the influence of leadership in NPO capacity building. As Light and Hubbard (2004) describe, "It is one thing, for example, to say that board development produced a more developed board, and quite another to argue that a more developed board produced a more effective organization, which in turn produced more programmatic outcomes, higher quality service, and so forth" (p.48). Therefore, we identified three key areas of study that complement the requests of GAGC's Executive Board. The following review of literature explores how leaders can build capacity by managing systems inside their NPO, managing resources of their NPO, and networking outside the NPO to gain support and achieve organizational goals and missions.



### *Building Capacity by Managing Systems*

While leaders of NPOs often search for ways to build capacity, many small NPOs lack staff experience in managing the complexities of NPO operations (De Clerck et al., 2021). Furthermore, most small NPOs operate with limited financial and human capital causing leaders to constantly stretch themselves to meet demands (Francis & Talanksky, 2013) . As a result, small NPOs consistently find themselves understaffed and unable to perform multiple functions effectively (Kinsey, et al., 2003). Therefore, to overcome many of these struggles, leaders of small NPO must use and manage systems via a systems-thinking approach to generate processes that allow their specific organization to build capacity. We identified three key system complexities that require consistent attention by leaders of NPOs:

- 1) Participation Complexity: Individuals, Organization-Wide, Networking (Cardona et. al, 2015)
- 2) Challenge Complexity: Who, what, and how (Castillo, 2019; Cardona et al. 2015)
- 3) Initiative Complexity: Short-term, long-term, on-going (Light & Hubbard, 2004)

We have presented a brief exploration of these three system complexities to help anchor our work with GAGC’s Executive Board. Ultimately, these aspects of systems-thinking will help clarify how to interpret our findings and organize our

recommendations into manageable opportunities for capacity building.

Building capacity through systems-thinking requires leadership to attend to the complex levels of participation in the organization, particularly when challenges are presented. Prior research highlights that capacity can be developed across multiple levels, including: micro, meso, and macro

**Figure 3.**  
*Key terminology of the Participant Complexity*

<b>Micro</b>	Individual Employee or Volunteer
<b>Meso</b>	Organization-Wide
<b>Macro</b>	Sector, Network, System, Society

(Cardona et al., 2015)



(Cardona et. al 2015). To view these levels and operational contexts, please reference **Figure 3**. Developing the capacity of multiple levels simultaneously enables the NPO to garner the greatest return on investment. For example, NPO programming at the micro level may enhance people’s knowledge, attitudes, and behaviors in ways that, at the meso level, strengthen culture, management practices, and connections to other organizations with the aim of, at the macro level, encouraging organizations into collective action networks.

Leadership must also attend to the complexities of the challenge at hand. To understand the influence of challenges when attempting to build capacity, leaders must attend to the strengths and weaknesses of system processes currently operating in the organization. Studies suggest that NPO leadership must begin to think of capacity building through the lens of *who*, *what*, and how if leaders wish to authentically achieve their shared vision for their selected community (Castillo, 2019; Cardona et al. 2015). To view these levels and operational contexts, please reference **Figure 4**. This complexity, alongside the aforementioned idea of understanding participation, begins to illustrate a clearer picture regarding how leaders must begin to think in systems if they wish to build capacity.

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**Figure 4.**  
*Key terminology of the Challenge Complexity*

<b>Who</b>	People, Organizations, Networks
<b>What</b>	Knowledge, Skills, Processes
<b>How</b>	Training, Collaboration, Assistance

(Castillo, 2019)

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In addition to levels of participation and challenge complexity, leadership must attend to the type of initiative complexities they wish to establish among their NPO to generate a solution. Initiatives generally fall into three categories:

- 1) short-term planning and training;
- 2) longer-term organizational effectiveness initiatives; and



3) sector-strengthening programs that develop systemic knowledge and encourage information exchange (Light & Hubbard, 2004).

The application of these complexities at multiple levels of an NPO provides leadership the capacity to generate new responses to challenges presented in their specific communities, thus increasing capacity systematically and sustainably. When working with GAGC, we used these various complexities to help build out recommendations regarding managerial processes for the Executive Board, focusing on the details of each category to help reroute energy and time into a more efficient leadership team.

#### *Building Systems by Managing Resources*

Prior research highlights the need to focus not only on the complexity of systems in an organization, but also on the resources used by the organization (Castillo, 2019; Cardona et al. 2015; Bates, 2012; Light & Hubbard, 2004). Therefore, leaders of NPOs who wish to continually improve their NPOs must not only focus on the system-outcomes of service to their community, but also to the stewardship of their resources as they build capacity among their organizations.

Hirschman (1958) described this aspect of capacity building as the process of making underutilized or unidentified resources available to be used productively and to generate opportunities for an organization. While research initially conceptualized the relationship between capacity building processes and resources in terms of money and durable goods like buildings and equipment, current research recognizes that intangible resources such as knowledge, relationships, and reputation are equally essential to value creation and organizational success (Castillo, 2019; Eisinger, 2002). Therefore, leaders who wish to build capacity should not just focus on tangible resources of their organizations, they must also consider the untapped potential of intangible resources.

Prior research explores the role of volunteer as a crucial example of an intangible resource for small NPOs (Brudney & Lucas, 2009). As volunteers donate their time and energy, they increase a



NPO's productive capacity for mission fulfillment. By leveraging volunteers based on their interests and motivations, NPO leaders can begin to witness the power of an active asset to their organization (Bates, 2012; Hirschman, 1958). Human resources have the potential, when coupled with processes, to become an NPO's greatest asset and as such they require care and support to remain productive. Therefore, part of our work to support GAGC included developing plans in which they could not only identify resources like a volunteer force, but also how to manage these resources within efficient systems to meet desired outcomes.

### *Building Capacity by Managing Networks*

When attempting to fill organizational resource gaps and repair overtaxed systems, smaller NPOs may look to external relationships with other organizations; however, managing these relationships requires expertise among the leaders of the NPO (Castillo, 2019, Cardona et al., 2015). Ancona and Bresman (2007), when thinking about building capacity via teamwork, attest that, "An exclusive internal focus is clearly no longer the recipe for survival and success" (p. 25). This type of capacity building, of working within and outside of a single NPO to achieve missions and visions by collectively leveraging resources and decision making, requires a set of skills for small NPO leaders hoping to make change for their communities (Guo & Acar, 2005; Gray, 1989). Thus, if leadership of NPOs wish to authentically build capacity in their organizations, for their colleagues and their communities, they must learn to look outside their own organizations to manage relationships that may prove beneficial.

One way to expand a small NPO's capacity would be to search and build relationships with larger NPOs, as this type of relationship can work to fill resource gaps of smaller NPOs (Isett et al., 2011). Leaders of small NPOs without capacity building awareness may be apprehensive in attempting these connections, but those who forgo opportunities to collaborate with other entities in order to prioritize critical community needs may cause NPOs to abandon challenging organizational



goals (Despard, 2017; Babiak & Thibault, 2009; Campbell, 2002). Therefore, as GAGC wishes to widen their reach among the state of Georgia, the Executive Board must acquire and tactfully manage their networks of external relationships.

While networking is an effective way to support gaps in organizational capacity, leaders of smaller NPOs, as opposed to their larger counterparts, are less likely to engage in strategic collaboration even though partnering with other organizations could aid the NPO in expanding services and sustaining impact for members (Child & Gronbjerg, 2007; Guo & Acar, 2005; Foster & Meinhard, 2002). Small NPOs may feel that creating a collaborative partnership means losing their autonomy, especially when interacting with a much larger NPO (Guo and Acar, 2005). Overcoming this fear, through effective management, is the role of small NPO leaders (Kim & Peng, 2018).

Research also shows that partnerships are more likely to form when the organizations are closely tied together through leader relations (Brown & Guo, 2010; Guo & Acar, 2005; Miller-Millesen, 2003; Middleton, 1987). As GAGC's Executive Board already hosts a wide network of external relationships, this strategy to overcome resistance in building and strengthening partnerships was critical to our work with the organization. Rather than operating from a place of volume, we identified the need to redirect leadership energy to foster and manage relationships that would expand the achievement of GAGC as they work to support the gifted community of Georgia.

Due to the typical nature of small NPO leadership, of volunteers who have little energy to waste but desire to impact their communities, management of systems, resources, and networks are paramount to the success of the organization. This task of managing multiple facets of an organization may prove overwhelming for volunteer leaders. Therefore, we felt that shifting perspective towards a more agile sector was critical to our understanding of how to support our organization. We explored building capacity in the for-profit sector to gain further insight as to how





leaders of businesses in a more risky fiscal landscape remain responsive when faced with challenges that threaten the stakeholders they wish to serve.

### **Learning about Capacity Building from the For-Profit Sector**

Building capacity in the for-profit sector often takes the form of, and is motivated by, competitive advantage. Similarly to the requirements of NPO leaders, leaders of for-profit organizations (FPO) must be aware of the relationship between the external environment that can affect and damage the FPO's success and the internal mechanisms of the FPO (Spanos & Lioukas, 2001). The external environment of an FPO refers to all outside factors and influences that impact operations of an FPO that require reaction and response in order to maintain the FPO's flow of operations. Internal mechanisms are defined as the steps FPOs take to actively monitor their progress and activities, and when necessary taking corrective actions so that the organization is consistently moving forward (Austin & Seitanidi, 2012; Spanos & Lioukas, 2001). Management of these resources and responses fall to the leaders of FPOs. In order for an FPO to create a competitive advantage over similar FPOs, and therefore survive, leadership must ensure that the organization is focused regarding their strategy, utilizing resources properly, and looking forward to sustaining capacity.

#### *Leadership's Role in Focusing Strategy*

Prior research suggests that the leadership of an FPO must select their method for pursuing an advantage over their competitors (Eldor, 2020). Leadership must make these decisions regarding operations to best fit the vision of the FPO (Hu et al., 2016; Brenes et al., 2014). What is key to note is that when leadership do not operate from a strategic mission, they will experience an overextension of their resources and personnel which can signal potential stagnation and possible termination of the FPO; however, when a FPO focuses their efforts and delineates processes, they may witness the competitive advantage that promotes survival and growth (Porter, 1980). For GAGC, this information



from the for-profit world begins to signal the need for GAGC Executive Board officers, if they wish to see growth occur, to focus their processes alongside their shared vision and mission.

In order for leadership of FPOs to collectively engage their FPOs in strategy creation, a clear vision must be set by leadership for the future strategic direction of the FPO (Pearce & Ensley, 2004). A shared vision allows for an employee to have awareness of the FPO's strategic objectives and future aspirations (Sosik & Dinger, 2007; Berson et al., 2001). Leaders establishing and operating in this shared vision have the capacity to impact the collective motivational attitude, ultimately affecting the contribution of employees to the success of the FPO (Bakker & Demerouti, 2017).

When leaders of FPOs refuse to focus their efforts, they may experience ramifications regarding the FPO's capacity to remain responsive to challenges. Porter (1985) argues that when leadership attempts to overextend current capabilities by way of many methods of competing in their environment, they will ultimately lead to a decrease of competitive advantage for the FPO. Therefore, it is crucial that FPO leadership focus their efforts on managing systems and strategy. When relating this to GAGC, and as discussed in Operational Context, the Executive Board must begin looking into strategy if they wish to increase the reach of their impact; without the board's intentional efforts to identify strategy including other stakeholder groups, such as Regional Representatives, cannot be effectively realized.

#### *Leadership's Role in Utilizing Resources*

An additional aspect of competitive advantage that must be mentioned is the FPO leader's capacity to recognize and manage their resources. Barney (1991) introduces his Theory of Resources and Capabilities, more commonly referred to as Resource-Based View (RBV), which focuses on the resources and capabilities controlled by the FPO that engender a competitive advantage. Resource-based logic suggests that business processes should:

- 1) exploit valuable but common resources to achieve competitive parity



- 2) exploit valuable and rare resources to achieve temporal competitive advantage
- 3) exploit valuable, rare, and costly to imitate resources to achieve sustained competitive advantage (Barney, 1991).

Capabilities from an RBV perspective refers to the possibility of using resources in a unique combination to develop a network of interactions among available resources (Amit & Schoemaker, 1993). However, resources by themselves, cannot be a source of competitive advantage (Lorenzo et al., 2018). A competitive advantage can only be achieved if the identified resource is leveraged by FPO leadership in tandem with the processes of the FPO. Stalk, Evans, and Shulman (1992) state, “the building blocks of corporate strategy are not products and markets but business processes” (p. 62). FPO leaders that fail to efficiently and effectively reconfigure their resources and capabilities into business processes cannot activate the full competitive advantage potential of their resources (Ray et al., 2004). Therefore, leadership must manage the processes alongside resources if they wish to see their FPO continue to be responsive to challenges brought on by competitive advantage.

#### *Leadership’s Role in Sustaining Capacity*

Once leaders of FPOs focus their strategy and identify resources to increase competitive advantage, they must then focus sustainability of this competitive advantage (Lorenzo et al., 2018). Pickett (1998) stresses that the sustainability of an FPO depends on the effectiveness of a FPO’s managerial capabilities- shared vision and leadership- along with the knowledge and skills of every individual in the FPO. Similarly to NPOs, the managerial capabilities of FPO leaders guide managers and employees towards the shaping of organizational resources and processes (Kor & Mesko, 2013). A leader’s inability to exploit the resources and capabilities of an FPO’s business processes alongside the skills and talents of employees may result in the deterioration of their ability to generate competitive advantages.



Additionally, leadership's intentional collective engagement of the FPO's employees has the capacity to create sustainable competitive advantage. Kahn (1990) defined collective engagement as the "harnessing of organization members' selves to their work roles, by which they employ and express themselves physically, cognitively, and emotionally during role performance" (p. 694). Engagement can manifest itself as an organizational capability when employees throughout the organization collectively invest themselves into their work roles - physically, emotionally, and cognitively (Rodríguez-Sánchez et al., 2021; Barrick et al, 2015; Craig & Silverstone, 2010; Kahn, 1990). However, when leaders of an FPO view collective engagement as an organizational capability, leadership must identify if they have the necessary components to build collective engagement as a resource, including: organizational processes, routines, and management approaches (Sirmon et al., 2011). If leaders wish to maximize the sustainability of their workforce, they must reflect on the untapped employee-centered resources which could be utilized to achieve the shared vision.

Ferraro, Pfeffer, and Sutton (2005) further the importance of collective engagement, indicating that a willingness of leadership to invest physical, emotional, and cognitive energies into the FPO's business goals can create a valuable and difficult to imitate capability. This effort on the part of leaders can differentiate a FPO from their market rivals via competitive advantage. Coupling shared vision with vulnerability of FPO leadership is a key requirement of collective engagement, as a shared vision can impact the psychological conditions necessary for engagement (Eldor, 2020). Similarly to NPO complexities in systems-thinking, elements such as 1) Psychological Safety, 2) Meaningfulness, and 3) Psychological Availability are all conditions to be considered and made available by FPO leadership. Awareness of these conditions is key for leadership because as competition intensifies, the impact of shared vision on collective engagement becomes more solidified thereby sustaining capacity (Bakker et al., 2007; Kirca et al., 2005; Hult & Ketchen, 2001).



The success of collective engagement is fully realized when the intensity of competition is high (Hu et al., 2016; Kohli & Jaworski, 1990). High competition demands an engaged workforce which operates to outperform external challenges presented in the sector and by other competitors. This engagement fosters an environment in which FPOs are continually adjusting to the ever-changing landscape of their sector. However, when competitive intensity is low, the FPO is under less pressure to outperform its competitors by offering superior service (Chen et al., 2015; Brown, 2001). This low intensity can create complacency among a FPO, causing resources and capabilities to stagnate and the overall FPO's capacity to respond to external challenges. Therefore, this low competitive intensity can lull leadership into a mindset of success, but this is only because they are not being challenged in their sector. We extend this occurrence to GAGC's Executive Board as, at present, there is very little routine, systematic identification of needs and challenges in their environment. Therefore, while all may seem well at present, the Executive Board may be unaware of needs because there is an avenue in which needs can be identified.

### **Blending For-Profit Processes for Small Nonprofit Needs**

In the for-profit sector, the process of improvement is often focused on competitive advantage, or the outperforming of one organization over another. This type of motivation, of profit or perish, funnels the intentions of for-profit leaders. To maintain competitive advantage, for-profit leadership become hypervigilant regarding the effectiveness of processes throughout their organizations. Maximizing organizational efficiency increases revenue dollars, which makes fiscal success a driver of increased performance; therefore, applying that same drive for consistent increase in proficiency and productivity in small NPOs, while non-traditional, could bring to light ways in which small NPOs can become even stronger stewards of their communities.



We maintain the argument that an effective organization not only responds to challenges faced by their communities but this type of organization continually questions and reflects on the success of their processes to meet their shared vision. In the case of GAGC, we wish to use for-profit tactics to look for innovative ways to improve the processes of their Executive Board. This board works tirelessly to serve the greater gifted community of Georgia, but as the education sector continues to increase in complexity, the board must work to build more agile processes to meet challenges brought by these complexities.



## VI. Conceptual Framework

GAGC, based on their overall mission to support the gifted education community throughout the state of Georgia, has become concerned with their capacity to systematically anticipate the needs of members as they work to meet challenges in gifted education. During preliminary discussions with GAGC Executive Leadership, it became apparent that the organization has cultivated a set of resources throughout its 50 year tenure; however, the organization, in its current configuration, hosts concerns about the capacity to anticipate rapidly changing external challenges of members, risking GAGC's survival, sustainability, and reputation. Thus, a framework was needed that analyzes GAGC's ability to act as a supporter of gifted education for their membership.

In order to build capacity in NPOs and FPOs, leaders must focus on capabilities and resources that are present and potentially underutilized by the organization (Shoemaker, Heaton, & Teece, 2018). Therefore, our collective framework couples two structures. The first portion of the framework focuses on the current capabilities of GAGC to respond to challenges and improve their capacity to respond to challenges. Second, we dig into the resources of the organization that must be leveraged alongside processes to accomplish the shared vision of the organization.

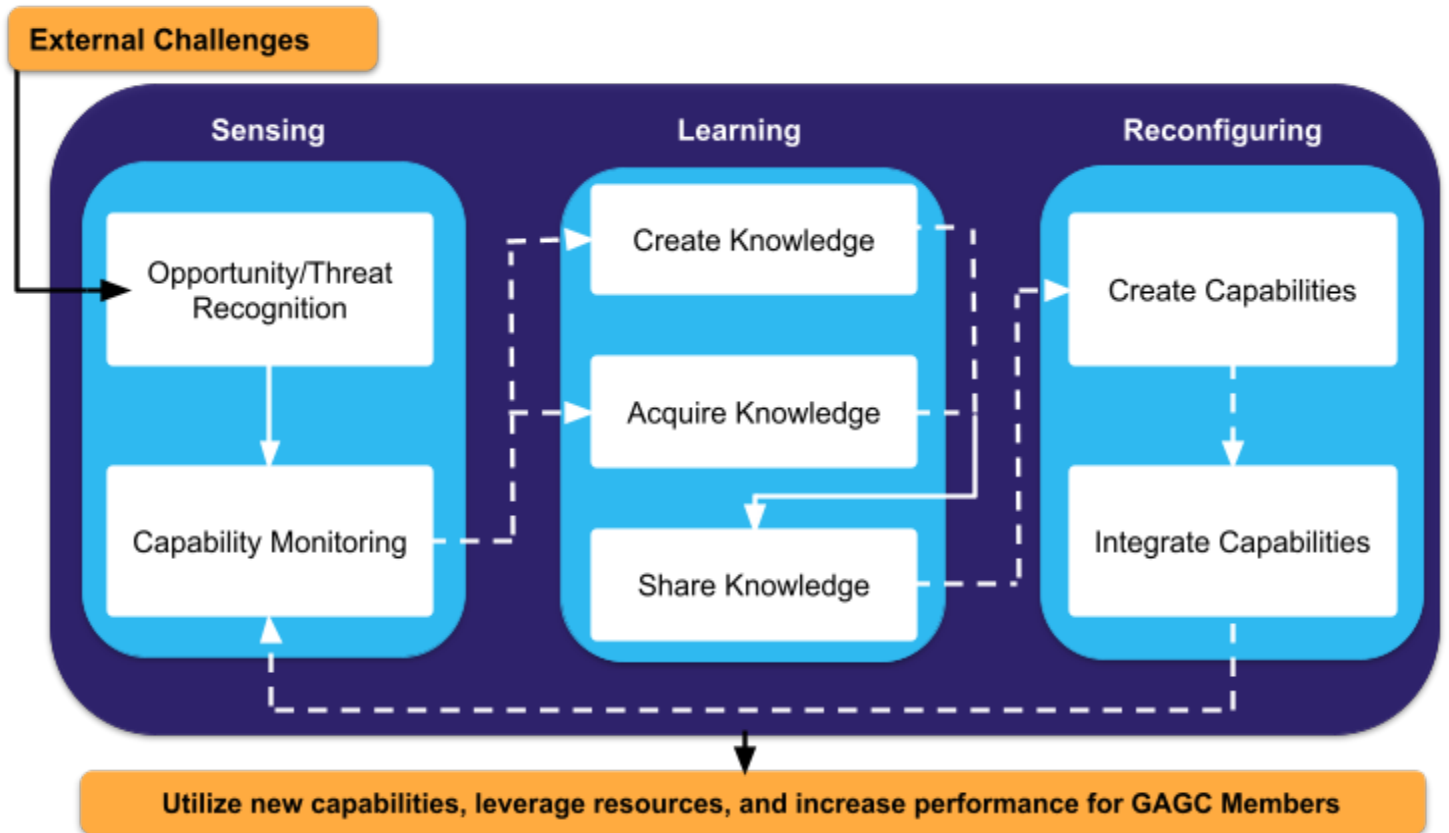
### Dynamic-Capabilities Framework

Dynamic-Capabilities Framework (DCF) is the systematic way in which an organization focuses on improving processes and capabilities as they respond to external challenges (Benner, 2009; Zollo & Winter, 2002). MacInerney-May (2011), through a synthesis of major studies in the field of DCF, develops the idea of DCF by identifying three major dimensions, or stages, of organizational behavior: *Sensing*, *Learning*, and *Reconfiguring* (MacInerney-May, 2011; Helfat et al., 2007; Teece, 2007; Teece et al., 1997). Additionally, MacInerney-May's study segmented the three DCF dimensions into seven major checkpoints, or steps, for organizations as displayed in **Figure 5**. When applying this framework



to GAGC, these checkpoints will directly connect to the data collection methods used to identify and understand points of improvement for the organization.

**Figure 5.**  
*Stages and Steps of the Dynamic-Capabilities Framework*



*Note: Adapted framework from MacInerney-May, 2011, p. 20*

### *Dynamic-Capabilities Sequence and Operational Terminology*

As the DCF is a system built of multiple processes, there is an abundance of terms that are important to generate understanding of this framework. What is critical to note is that while the nature of **Table 1** implies a sense of linear finality to this series of stages and steps, the DCF promotes a recursive nature when applied, more aligned to **Figure 5**. In order for an organization to survive beyond individual challenges, they must see this process as recursive, that once an external challenge is abated another will present itself and the cycle of DCF continues. Therefore, when





thinking of this framework, DCF requires the organization to think in stages and steps, but also know that the organization may return to any stage or step when needed.

**Table 1.**  
*Operational Terminology of Dynamic-Capabilities Framework*

Stage	Definition	Step	Definition
<b>Sensing</b>	Organization's ability to recognize changes in their environment that could potentially impact their organization  (MacInerney-May, 2011; Teece, 2007; Capron & Mitchell, 2009; Lavie, 2006)	<b>Opportunity Recognition</b>	The ability to identify changes in the organization's environment (MacInerney-May, 2011)
		<b>Capability Monitoring</b>	The internal surveillance of existing capabilities to ensure internal processes are effective and efficient (MacInerney-May, 2011)
<b>Learning</b>	Organization's ability to identify current internal knowledge and the capacity to add external knowledge to a shared understand among organization's members when combating challenges (MacInerney-May, 2011; Zahra & George, 2002; Kogut & Zander, 1992).	<b>Knowledge Creation</b>	The ability to create new knowledge internally within the organization (MacInerney-May, 2011)
		<b>Knowledge Acquisition</b>	The ability to acquire new knowledge from external sources (MacInerney-May, 2011)
		<b>Knowledge Sharing</b>	The ability to transfer and disseminate knowledge through the organization (MacInerney-May, 2011)
<b>Reconfiguring</b>	Organization's process of revising and rebuilding their system to strengthen the organization's response to the current challenge and future challenges  (MacInerney-May, 2011; Carlile, 2004; Teece, 2007; Eisenhardt & Martin, 2000; Teece et al., 1997; Iansiti & Clark, 1994)	<b>Capability Creation</b>	The ability to internally build new processes to strengthen the organization's system (MacInerney-May, 2011)
		<b>Capability Integration</b>	The ability to include new processes into the organization's existing system, connecting and linking these processes with existing resources and capabilities (MacInerney-May, 2011)

As **Figure 5** illustrates, the goal of the DCF series is the production and integration of new processes and resources that will benefit the community or consumer an organization is supporting. In the case of GAGC, this sequence, once applied and continually improved by the Executive Board, will serve to generate new capabilities to support the greater GAGC membership who will, in turn,

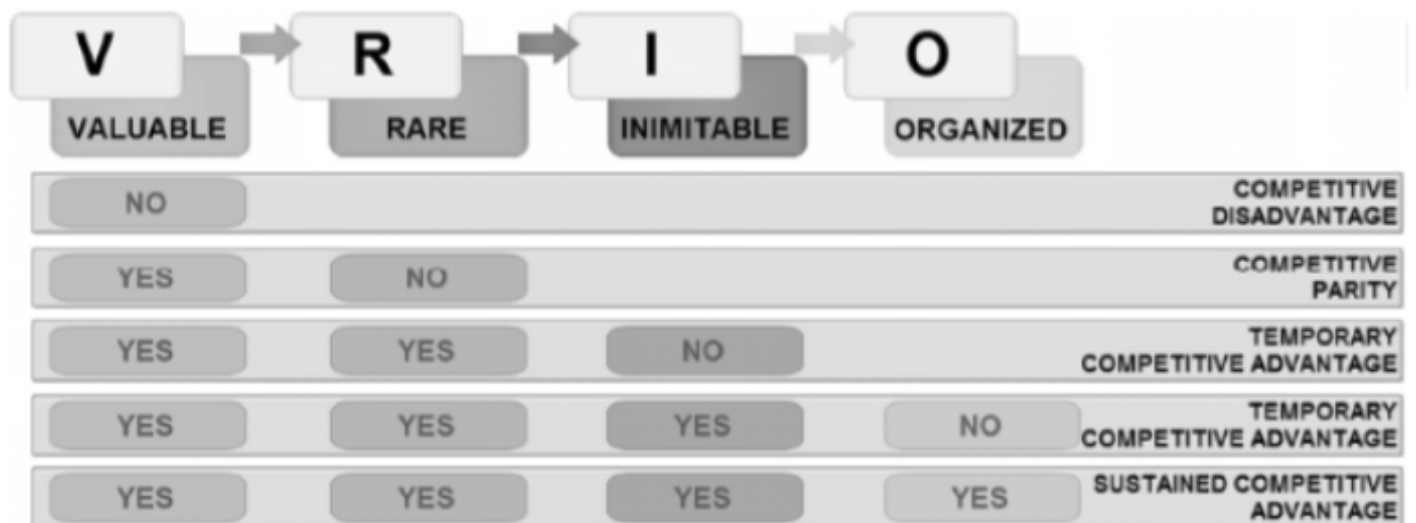


support the children and classrooms of gifted education throughout the state of Georgia.

### Resource-Based View

In addition to Dynamic-Capabilities, much of the literature in the field of organizational improvement hinges on the concept of Resource-Based View (RBV), the logic of how resources affect an organization’s capacity to perform (Ariyani et al., 2018). RBV, as clarified in **Figure 6**, observes the impact of current resources on an organization’s ability to be competitive (Cardeal & Antonio, 2012; Barney & Hesterly, 2012; Barney, 2001; Barney, 1991). To further clarify, RBV states that an organization may only remain competitive if their most valuable resources are leveraged effectively for the needs of the organization (Barney, 1991).

**Figure 6.**  
*Resource-Based View with VRIO Process to measure Competitive Advantage*



Note: (Indartono, Wibowo, & Sudiyanto, 2010)

When exploring RBV, much of the conversation surrounding competitive advantage hinges on the value, rarity, inimitability, and use of resources in an organization (VRIO) compared to other FPOs (Indartono et. al, 2010). As mentioned previously, while GAGC might not be competing against other gifted organizations in the state of Georgia, the Executive Board of this NPO struggles to compete



against the ever growing external challenges of gifted education. With time and energy as limited resources, this type of framework helps to identify additional resources and the reconfiguring of current resources that may prove useful for the organization.

Prior studies organize characteristics of VRIO into three major categories (Ariyani et al., 2018; Cardeal & Antonio, 2012; Indartono et al., 2010; Barney, 2001; Barney, 1991). The first, and largely influential category is often labeled *Specialized Know How*, or the specific knowledge held by an organization (Indartono et al., 2010). This specific knowledge is often intimately understood by leadership of an organization and is systematically shared among the members of the organization to help the organization compete against challenges of the organization's environment. Within the context of this study, the *Specialized Know How* resource concept is coupled with the Executive Board's ability to manage and grow their systems to build capacity.

*Reputation* is another major category when identifying and understanding the VRIO capacity of an organization. This type of resource is often built when leaders are able to effectively manage resources and therefore become formidable in their sector and dependable for their clients or members (Indartono et al., 2010). Within the context of this study, the *Reputation* resource concept is coupled with the Executive Board's ability to gain leverage among stakeholders to support the greater gifted community of Georgia.

Finally, *Cooperative Alliances* are a critical VRIO category for most organizations, particularly those organizations that have trouble building capacity on their own. These resources are often relationships that help leaders build capacities that are not currently owned internally by the organization (Lin & Wu, 2013; Wu, 2010; Indartono et al., 2010). Within the context of this study, the *Cooperative Alliances* resource concept is coupled with the Executive Board's ability to manage networking to meet the capacity needs of their larger organization.



## **Coupling the Dynamic-Capabilities Framework and Resource-Based View**

Lin and Wu (2013) indicate that RBV is just a step towards a more complete study of an organization's capacity to build a stronger, more agile, organization. Additional research advances the interconnectedness of DCF and RBV by clarifying that the "O" in VRIO determines an organization's ability to leverage identified resources when the organization is in action (Cardeal & Antonio, 2012). This leveraging can only be discovered when placing resources alongside the system at play in an organization, indicating the demand for DCF and RBV to be studied in tandem.

GAGC's Executive Board must understand what resources they have to offer as well as how to reconfigure their processes to better leverage these resources more dynamically. As the Executive Board is interested in improving their organization's ability to support their members, we worked to explore how their process and resources work together, or possibly against one another, to tackle challenges in the gifted education landscape.



## VII. Project Questions

### Research Question

*How can the Executive Board of GAGC continually improve their processes and access to resources for the betterment of their membership in an ever changing gifted education landscape?*

Our overarching research question incorporates the interconnectedness of DCF and RBV while also considering the ultimate goal of GAGC's Executive Board. We worked to frame our question to not only investigate the processes in place, and perhaps identify where processes are absent, but we wanted to find ways to target and leverage resources alongside processes. This type of coupling, of process to resource, will ripple throughout each of our supporting research questions, our findings, and our recommendations.

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### Supporting Question One:

*As the gifted education landscape changes, what capabilities and resources are currently used by GAGC to identify and understand the needs of their membership?*

This first supporting question parallels the *Sensing* stage of the DCF, in which we identify processes already in place regarding the identification of external challenges to Georgia's Gifted Community. During preliminary conversations with the Executive Board, this type of behavior- of routine sensing- seemed to be nearly absent, prioritizing the need to observe what is present and how resources already available to GAGC are currently leveraged for this stage in the DCF.

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### Supporting Question Two:

*As the needs of members are identified, what capabilities and resources are currently in place to help GAGC learn and share information among their membership?*

This second supporting question parallels the *Learning* stage of the DCF, in which we identify processes already in place and needed to acquire and create knowledge regarding best practices of working as an Executive Board when serving the greater membership. Improvement in this stage will also increase the ability to disseminate knowledge across the organization to serve the gifted community of Georgia.

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### Supporting Question Three:

*When GAGC learns in response to new challenges in gifted education, what capabilities and resources are currently in place to help GAGC evolve to support member needs?*

The third supporting question parallels the *Reconfiguring* stage of the DCF, in which we were attempting to identify systems already in place regarding the ability of GAGC's Executive Board to integrate new processes into their system. This portion of the study will help to serve the greater membership of GAGC by identifying where systematic changes may need to occur to strengthen the overall dynamic capabilities of GAGC as they respond to external challenges.

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## VIII. Project Design

As GAGC is larger than a single program- offering teacher education, social justice support to gifted students, legislation lobbying, and more- evaluating one program that is generated from the hard work of this organization would not serve their needs to build capacity as an evermore dynamic institution of Gifted Education in Georgia. However, we found it helpful to consider and apply a few elements of program evaluation in our initial approach to this project design.

Our evaluation structure is primarily an independent evaluation. We gathered as clear a picture as possible regarding the needs of GAGC through preliminary discussions with leadership and then developed our framework and collection approach separate from the stakeholders of the organization (Rossi et al., 2019). This type of structure is applied throughout most of the methodology with one exception, when working within RBV. At this point in data collection, we realized the power of including the organization's decision makers, the Executive Board, in a more collaborative-evaluation process, asking for their input as a focus group before formulating questions for follow-up forms (Rossi et al., 2019).

### Data Collection

As GAGC is more intimate in size, most of our data collection relied heavily on nonprobability sampling. Much of our data collection focused specifically on the decision makers of GAGC, as they are responsible for the processes and structuring of the organization (Rossi et al., 2019). More specifically, we worked with convenience sampling throughout much of the research process, as the volunteer capacity of the Executive Board made consistent access to their entire leadership team difficult. To combat the problematic nature of this type of sampling, we worked to triangulate our study, pulling data from multiple methods to cross-check our understandings of each data set (Babbie, 2017; Gay et al., 2009). Therefore, we worked from three angles of data within this study. We leveraged the Dynamic-Capabilities Framework (DCF) to understand the current process of



GAGC. We applied the Resource-Based View (RBV) to understand the resources available to aid in the processes of GAGC. We used a member-wide survey to identify and integrate the needs and potential challenges of Georgia's Gifted Education community for our immediate recommendations.

### ***Dynamic-Capabilities Framework: Cognitive Interviews and Scaled Questionnaire***

To gain a clear picture of how GAGC's current Executive Board operates when presented with challenges, we applied a method to isolate each step within the stages of the DCF (see **Table 1** for a description of these steps and stages). This method not only helped us gain insight regarding the current processes, it also allowed us to compare perspectives of board members who contribute to the success of GAGC. We were interested in documenting the contrast of processes as they apply to the Executive Board in comparison with other stakeholders of the organization. Finally, we worked to identify any misalignments or misunderstandings of progress held by the Executive Board members, as preliminary conversations with this team often revolved around a small number of successes with big impact (e.g. annual convention, anti-racism coalition, endorsement scholarship) rather than a system of success for the organization.

### ***Dynamic-Capabilities Framework Instrument***

Due to the level of construct validity established in MacInerney-May's 2011 study of the stages in the DCF, we adapted their Seven First-Order Factors instrument to investigate how GAGC leadership currently views their own dynamic capabilities. MacInerney-May's instrument generates seven factors connected to the DCF, as described in **Figure 5** and **Table 1**, and these factors are then split into a series of statements. Thus, the instrument has a total of twenty-five statements that align to the seven factors established in the DCF.

To adapt MacInerney-May's instrument, we replaced for-profit, firm-based language with the language of GAGC and the gifted education community in all twenty-five statements. For example, MacInerney-May's instrument provides the statement, "We are slow to detect fundamental shifts in



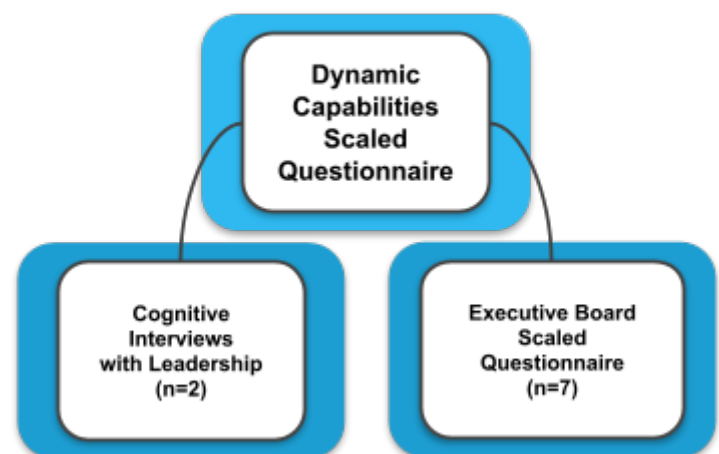
our industry”. We replaced the key word *industry* with *Georgia education*, to result in the following statement, “This organization is slow to detect fundamental shifts in Georgia education,” making this statement series fit the NPO lens and also apply specifically to GAGC. Please note, to aid our participants in thinking about GAGC as a collective, we used the phrase “the organization” rather than the collective pronoun “We” when applicable.

We did not alter the scoring system of MacInerney-May’s study, in which participants are asked to rate the truth of each statement on a seven-point scale (1 being strongly disagree and 7 being strongly agree). Therefore, due to both of the procedures below, we were able to gather a snapshot of where the organization is currently regarding their ability to respond to challenges in the gifted education landscape and gain evidence that will help us generate recommendations for organizational improvement in the realm of Dynamic-Capabilities.

#### *Procedure One and Participants: Cognitive Interviews*

Our first form of data collection with this instrument were individual cognitive interviews with the Executive Board leadership (P=12; n=2). Participants for this process were chosen due to their senior leadership status on the board as well as their extensive history in supporting GAGC from a leadership perspective. After providing informed consent, each participant was asked the series of twenty-five adapted statements. Acting as participant observers of subject thought processes, we walked both subjects through each statement, exploring their rationalizations of the statements and their scoring process using the seven-point scale provided (Gay et al.,

**Figure 7.**  
*Dynamic-Capabilities Data Collection Process*







2009). When listening to each participant explain their scoring, we probed organically for clarity regarding their thinking. Each interview was recorded to allow for review and coding by our Capstone team.

This cognitive interview process proffered insight into Executive Board perspectives regarding the current capabilities of GAGC. Additionally, as we made the decision to conduct these interviews prior to the dissemination of the questionnaire, hearing the rationalizations of these participants provided us with knowledge regarding the clarity of the instrument statements. Minor adjustments were made to questionnaire items for clarity after these cognitive interviews and before this instrument was distributed to the larger leadership team (see **Figure 7** for clarification).

#### *Procedure Two and Participants: Executive Leadership Questionnaire.*

After the cognitive interviews and minor instrument revisions, we then distributed the questionnaire, hosted by Qualtrics, digitally to all Executive Board members (P=12) via their Executive Board email list. Respondents (n=7) remained anonymous. The results of this method contributed information to help pinpoint locations in the First-Order factors that should be improved to meet the goals of GAGC. To review the recruitment language and consent process for both procedures, please refer to **Appendix B**.

#### **Resource-Based View: VRIO Process**

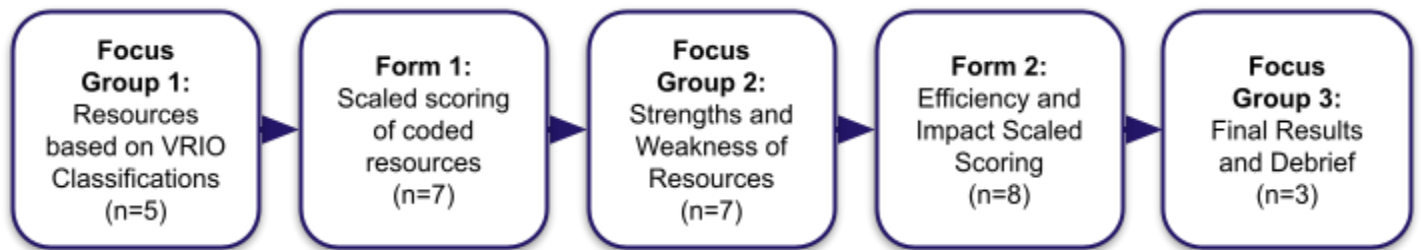
After analyzing multiple studies applying Resource-Based View (RBV) in the for-profit sector, we identified a specific VRIO (Valuable, Rare, Inimitable, Organization) process that could be completed in collaboration with the current leadership of GAGC. VRIO hinges on the capacity to list all resources currently available, information held only by the current Executive Board (Ariyani et al., 2018; Lin & Wu, 2013; Indartono et al., 2010). Thus, we created a cycle in which we hosted focus groups followed by subsequent scaled-response forms to aid in determining the VRIO of each resource (Babbie, 2017). This cycle, represented in **Figure 8**, and adapted from Ariyani, Daryanto,



and Sahara's 2018 VRIO study, allowed us to gain insight into the resources available of the collective leadership team while also expanding individual perspectives regarding the value, rarity, inimitability, and if these resources are being managed by GAGC efficiently.

Our adaptations were few, mainly diction in our prompts to match the discussion applicable to GAGC; however, one important adaptation was the addition of *Efficiency* and *Impact* in Form 2. We felt that, based on prior experience collecting data with the Executive Board, requesting ratings of the Organization's use of resources was too abstract to gain insight into resource use. Therefore, we broke apart this final aspect of VRIO into more clear terms prior to delivering this form to the Executive Board. The application of this process, or procedure, is entirely interrelated with the analysis process; therefore, to see the procedure in full, please reference the analysis section labeled Resource-Based View Analysis Process. To view the cycle and instruments that were used for this method, please reference **Appendix C**.

**Figure 8.**  
*Resource-Based View Data Collection Process*



*Note:* Adapted from Ariuani, W., Daryanto, A., Sahara, (2018)

### *Participants*

We sought to work with the entire Executive Board (P=12) via a sequence of virtual meetings and digital forms to establish the list of resources currently available and then to collectively label these resources with the aforementioned criteria. However, as this process was incredibly comprehensive, participation varied from stage to stage of the process ranging from three to eight



participants throughout the VRIO sequence. This lack of consistent participation is a limiting factor for the results of this process.

### **GAGC Member-Wide Survey**

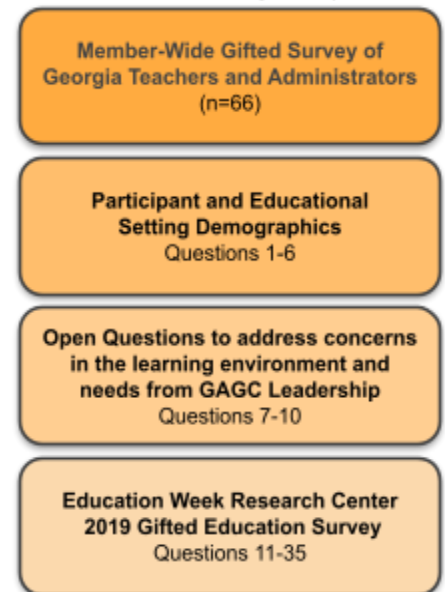
Working with the leadership of GAGC offers a clear perspective of the organization’s current operations and processes; however, there are many gifted educators and administrators in the larger membership who can assist in sensing challenges of their gifted students. This sensing in the larger community will help GAGC’s Executive Board to learn and reconfigure to better align resources and capacity to aid members in their work as gifted educators. Thus, it was necessary to gain a better understanding of the needs of the larger gifted community and possible challenges that will arise for members of GAGC.

We adapted EdWeek Research Center’s 2019 National Survey of gifted teachers and administrators, represented in **Figure 9**, to understand these needs and challenges from the perspective of GAGC educators. This survey, hosted on Qualtrics, was sent in multiple waves (October 2020, December 2020, February 2020) via the GAGC Executive Board’s current email list-serve (P= approx. 1,100; n=66). To view the survey instrument, please see **Appendix D**.

### **Data Analysis and Preliminary Results**

In our attempt to bridge for-profit behaviors with NPO needs, we gathered data surrounding the DCF and RBV currently in place among the GAGC Executive Board. All classifying and coding, including framed and open processes, were conducted as a team. This allowed us to not only sensemake the results of our method comprehensively, but also allowed

**Figure 9.**  
*Member-Wide Survey Components*



*Note: Adapted from Education Week Research Center (2019)*



us to check one another in our approaches, assumptions, and ways of thinking about the results of both qualitative and quantitative data collection.

The following section provides a discussion of each data set collected and clarifies our intentions to triangulate this data when discussing our findings and recommendations. As our findings rely heavily on the synthesis of all three data collection methods outlined in this section, we felt it was prudent to provide preliminary results of each method alongside our analysis procedure. These results will then be triangulated to provide more comprehensive findings for GAGC.

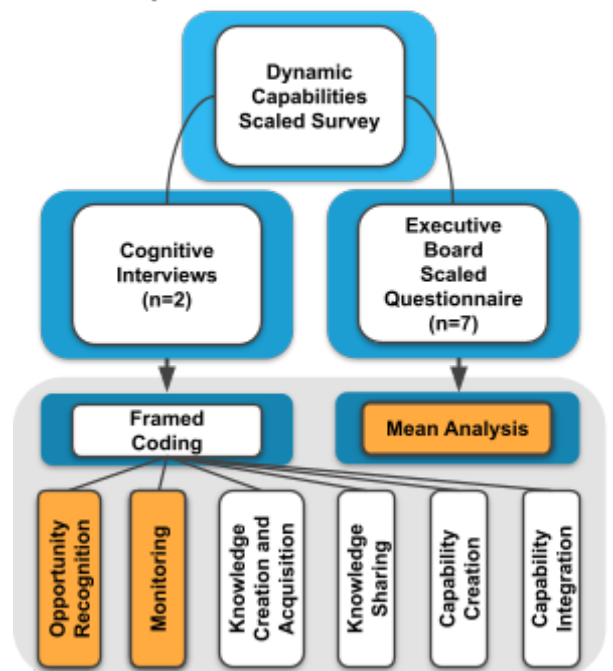
### ***Dynamic-Capabilities Framework Analysis Process***

Our mixed-method data collection approach to the DCF provided complementary qualitative and quantitative insight into the current state of GAGC's capabilities when responding to external challenges (Gay et al., 2009).

#### ***Cognitive Interview Analysis Procedure***

Cognitive interviews (n=2) of Executive Board leaders were conducted early in the process of our research to help clarify leadership's perspective of the current status of the GAGC Executive Board. These were coded within the framed steps of the DCF to help gather insight for our findings and recommendations based on each step of the DCF (see **Figure 10**). These cognitive interviews did not act as drivers of our findings, but rather, contextualized the quantitative responses proffered by the larger Executive Board via the Questionnaire.

**Figure 10.**  
*Dynamic-Capabilities Data Analysis and Preliminary Results*





### *Executive Leadership Questionnaire Analysis Procedure*

We followed these cognitive interviews with a scaled questionnaire sent to all Executive Board members (n=7). **Table 2** provides the mean results of this questionnaire, helping us pinpoint places where the Executive Board would like to focus in terms of generating a more effective response process for their organization.

To analyze this data, we first focused our attention on the polarized quantitative means for each factor in the DCF, noting places where the entire Executive Board indicated needs for improvement (highlighted in **Table 2**). We used a mean threshold of 5.5, as a score higher than this would place the board in general agreement regarding the capacity of the Executive Board to serve the greater membership (i.e. identified as a non-issue for the GAGC leadership team). We then identified the clustering of scores lower than our designated threshold, as large clustering would indicate specific factors in the DCF that would need help via our recommendations. These questionnaire responses were then contextualized with the cognitive interview transcripts, exploring the nuances of these steps in the DCF

### *Preliminary Results of Executive Leadership Questionnaire*

From this process, we identified that Steps 1 and 2/7- Threat Recognition and Capability Monitoring, respectively- were concerns that we needed to bring into our findings and recommendations. It should also be noted that statements fifteen and seventeen were concerning for the board, both of which are discussed in the findings section as well.



**Table 2**  
*Preliminary results from Dynamic Capabilities Scaled Questionnaire*

	Item	Question in Scaled Questionnaire	Mean
Opportunity Recognition Framework Step 1	1	This organization is slow to detect fundamental shifts in Georgia education.	5.25
	2	This organization periodically reviews the likely effect of changes in Georgia education as it connects to teachers of Gifted students.	4.00
	3	This organization quickly understands new opportunities to serve their members.	6.00
	4	This organization is very good at observing and anticipating technological trends in Georgia education.	5.25
Monitoring Framework Step 2 & 7	5	This organization regularly checks the quality of their ability to function in comparison to other gifted organizations.	5.25
	6	This organization regularly checks the quality of their ability to function in comparison with other non-profit educational organizations.	4.00
	7	This organization pays great attention to monitoring the change of their abilities to function.	6.00
	8	After changing existing capabilities or integrating new capabilities, this organization pays great attention to monitoring the efficiency of new processes.	5.25
Knowledge Creation & Acquisition Framework Step 3	9	The organization's members have the capabilities to produce many novel and useful ideas.	6.75
	10	Within this organization, members have the capabilities to successfully learn new things.	7.00
	11	Members have the capability to effectively develop new knowledge or insights that have the potential to influence Gifted education in Georgia.	6.25
	12	When solving problems, members can rely on strong regional support.	6.00
	13	The organization frequently acquires knowledge about technologies and education trends from outside the organization.	5.75
	14	This organization is able to identify and acquire external knowledge (e.g. evidence-based practice, pedagogy, technology) very quickly.	6.25
Knowledge Sharing Framework Step 4	15	Members of the organization regularly visit other Georgia schools to learn about new technologies, trends, or teaching models.	4.00
	16	Existing knowledge (e.g. education or technology) is readily available to each member within the organization.	5.75
	17	This organization periodically circulates codified knowledge in the form of documents (e.g. reports, newsletters) to update their members.	5.25
Capability Creation Framework Step 5	18	When something important happens (education, legislative, or technological development), the whole organization knows about it in a short period.	6.00
	19	This organization is effective at transforming existing knowledge into new resources (e.g. new pedagogy/learning strategies, new professional development, new technical equipment).	5.50
	20	The organization's members introduce innovative changes that lie outside the current opportunities and abilities of the organization.	6.75
	21	The organization's members are able to identify valuable organizational components, connect, and combine them in new ways.	6.00
	22	This organization can effectively recombine current abilities and strategies into innovative combinations.	6.00



Capability Integration Framework Step 6	23	The organization's members integrate new and existing ways of doing things without stifling your primary role inside your school district.	6.00
	24	This organization can effectively integrate new externally sourced strategies and combine them with current strategies into innovative combinations.	6.50
	25	This organization can successfully integrate the new knowledge acquired with their existing knowledge.	6.25

*Note:* Most concerning means are highlighted as points of focus for findings and recommendations.

Application of these leadership-identified needs to our findings and recommendations were crucial, as this section of our research helped to solidify the current capabilities the Executive Board must rely on when responding to challenges in the gifted education landscape. As this portion of our data collection is perspective based, triangulation with additional data sets will further build a more comprehensive picture of the needs of GAGC; however, as we were able to gather data among most of the Executive Board, the perspective gained is incredibly helpful as these are the individuals who will be able to make the most impact on GAGC's responsive approach to external challenges.

### ***Resource-Based View Analysis Process***

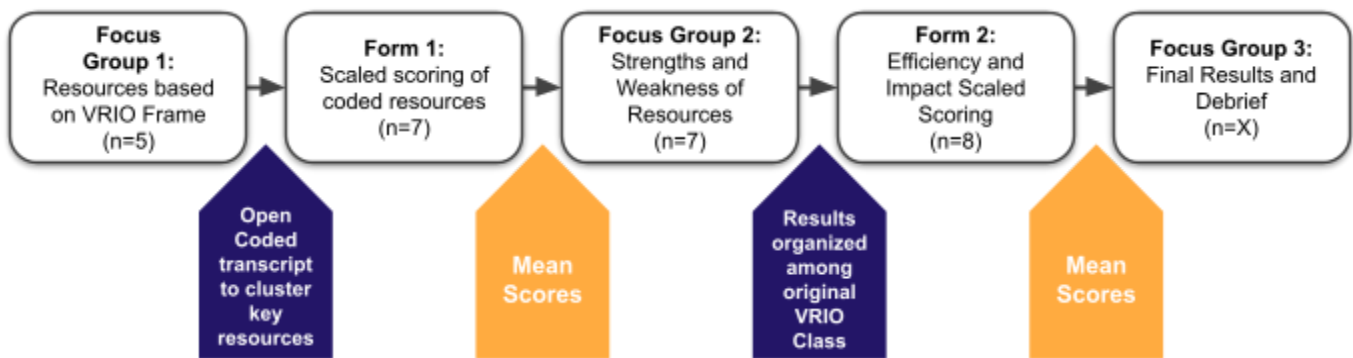
Our goal when analyzing the results of the RBV VRIO process was to understand what resources the organization already leverages alongside their current capabilities. This method allowed us to address, in our recommendations, which resources are needed and which resources should be reconfigured to improve the organization's capacity to increase their capabilities when supporting the gifted community in the state of Georgia.

The RBV VRIO process resulted in five unique, complementary data sets consisting of three focus group sessions and two forms, alternating in delivery. This oscillating behavior of moving from Executive Board focus group to individual form completion helped us leverage the relationships of the board while avoiding the stagnation of groupthink; additionally, this process provided agency for each member of the Executive Board to vocalize their unique perspectives based on their own experience and position on the Executive Board. As this process was incredibly involved, consistency of



attendance to focus groups and form completion was a struggle. Thus, while we feel that we have a fairly accurate picture due to majority participation of the Executive Board, it should be noted that the presence of all twelve board members was not felt in each step of the VRIO process. Review **Figure 11** for a visualization of this process.

**Figure 11.**  
*Resource-Based View Data Collection with Analysis Process*



*Note:* Findings from each form were shared with the subsequent focus group throughout the cycle.

Before exploring each data set, it is also important to note that working through the VRIO process with the Executive Board was just as impactful as the results, findings, and recommendations that will come from this portion of our research. In hosting these focus groups and follow-up forms, we feel that awareness was generated surrounding the current functionality of the group, and we often found ourselves redirecting participants to focus on their current processes instead of solutioning or projecting what they would like to see happen in the future. This type of interaction, of participatory-evaluation, with Executive Board members indicates a sense of validity in our approach, as we were able to begin increasing the motivation to transparently analyze their own system even before providing results of the study to the entire group (Rossi et al., 2019).

#### *Focus Group One: Analysis and Preliminary Results*

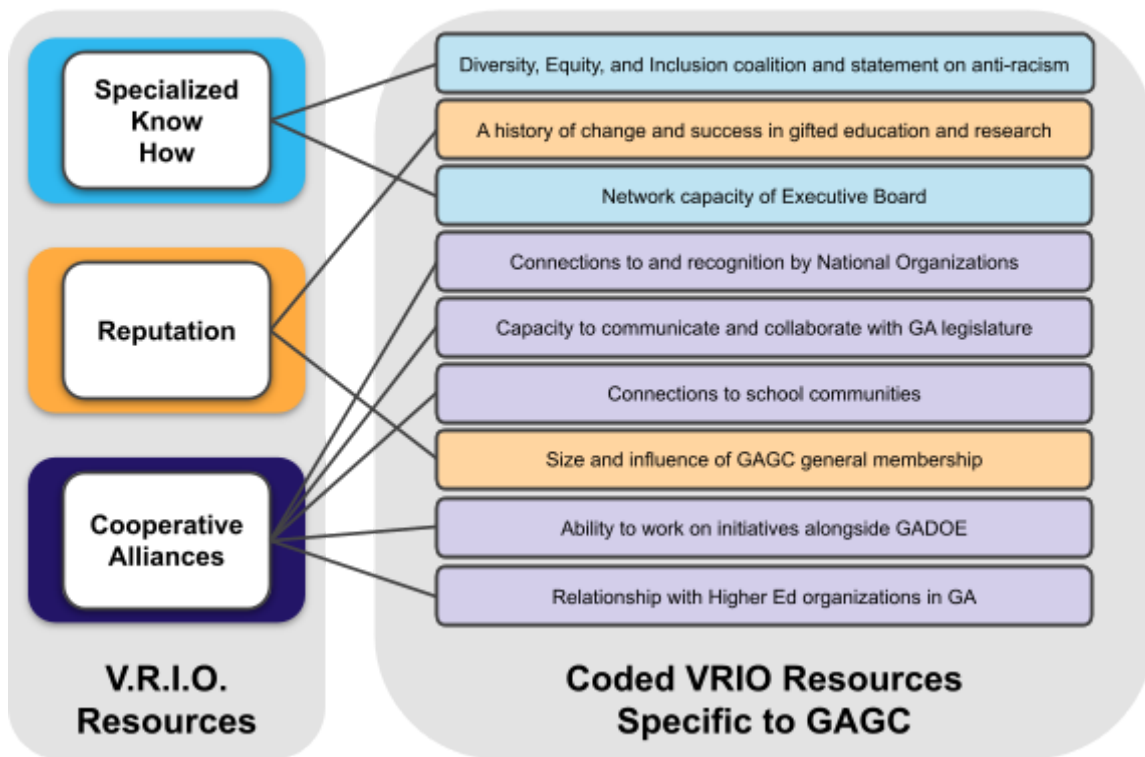
This focus group (P=12; n=5) resulted in a large volume of qualitative data framed around the three core classifications of VRIO- *Specialized Know How, Reputation, and Cooperative Alliances*





(Indartono, Wibowo, & Suiyanto, 2010). Our research team worked together to open code the results of this focus group, transitioning our initial VRIO classification into open codes specific to the responses of the Executive Board (Babbi, 2017; Gay et al., 2009). This resulted in nine unique, GAGC identified, VRIO resources that led the rest of our VRIO exploration with the Executive Board. These resources, as aligned with the original VRIO framing, are visualized in **Figure 12**.

**Figure 12.**  
*Relationship between original VRIO classifications and GAGC-specific coding*



### *Form One: Analysis and Preliminary Results*

With the key VRIO resources identified in focus group one, our team released a digital form via email to allow the Executive Board to evaluate the value, rarity, and inimitability of these resources (P=12; n=7). In prior research surrounding VRIO, part of the construct validity of this process focused on the descending order of scoring from value to rarity to inimitability (Indartono et al., 2010). We were pleased to see this same pattern occur in our own results, as exhibited in **Table 3**. Our



preliminary results identified that the board does not hold value in one classification of the VRIO framework over the other; however, more focus was present in the *Cooperative Alliances* classification of the framework compared to *Specialized Know How* and *Reputation*.

**Table 3**  
*Results from VRIO Form One*

Code	Resource	Value	Rarity	Inimitability
	Ability to work on initiatives alongside GA DOE	3.86	2.71	2.29
	A history of change and success in gifted education and research	3.71	3.43	3
	Diversity Equity and Inclusion Work (e.g. Anti-Racism Statement)	3.71	2.86	2.71
	Capacity to communicate and collaborate with the GA Legislature	3.71	2.86	2.43
	Connections to school communities (RESA, School Leaders/Teachers, and/or Parents)	3.71	2.57	2.43
	Size and influence of GAGC general membership	3.43	3	2.86
	Relationship with Higher Ed organizations in GA	3.29	3.14	2.43
	Network Capacity of Executive Board	3.29	2.86	2.43
	Connections to and Recognition by National Organizations	3.14	2.71	2.29

Note: Results are organized based on highest value mean and are coded similarly to **Figure 12** to contrast the resource identified to the original VRIO framework.

Color Code for each VRIO Resource:



### *Focus Group Two: Analysis and Preliminary Results*

This focus group worked to share the collective results from focus group one and form one (P=12; n=7). In reviewing these results, we pushed participants to explore the strengths and weaknesses of each resource identified and rated, helping us further understand each resource. Results of this discussion were not coded separately from their resources. Rather, we used the information from this discussion as context regarding how to approach the needs of GAGC as we make recommendations, harnessing strengths and working to solve weaknesses based on the recommendations in the VRIO literature. Preliminary results indicated that while many of the resources were highly prized by the Executive Board, a key weakness of these resources is the



time-intensive nature of the resources. With a volunteer team, resources that take too much time to manage appeared to be less favorable.

**Table 4**  
Results from VRIO Form 2

Code	Resource	Efficiency	Impact
	Diversity Equity and Inclusion Work (e.g. Anti-Racism Statement)	3.86	3.86
	A history of change and success in gifted education and research	3.57	3.57
	Network Capacity of Executive Board	3.57	3.57
	Connections to and Recognition by National Organizations	3.57	3.71
	Capacity to communicate and collaborate with the GA Legislature	3.43	3.43
	Connections to school communities (RESA, School Leaders/Teachers, and/or Parents)	3.43	3.71
	Size and influence of GAGC general membership	3.43	3.57
	Ability to work on initiatives alongside GA DOE	3.38	3.25
	Relationship with Higher Ed organizations in GA	3.29	3.14

Note: Results are organized based on highest efficiency mean and are coded similarly to **Figure 12** to contrast the resource identified to the original VRIO framework.

Color Code for each VRIO Resource:

Specialized Know How	Reputation	Cooperative Alliance
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### Form Two: Analysis and Preliminary Results

The final form for VRIO required members to rank the efficiency and impact of the resources currently available to GAGC (P=12; n=8). The results of this form indicate that GAGC feels that their resources are used efficiently and host large-scale impact on the greater membership of GAGC. We provided open-response space for Executive Board members to help clarify their scoring, but with very few open-responses, coding was not applied. What is important to note, and visualized in **Table 4**, is that while the volume of resources from focus group one are categorized as *Cooperative Alliances*, GAGC felt their most efficient resources are those from the *Specialized Know How* category. This will be important during triangulation, as the *Specialized Know How* process is heavily dependent on the dynamic capabilities of the organization (Lin & Wu, 2013).



### *Focus Group Three: Analysis and Preliminary Results*

The final discussion related to the results of form two and a debrief of the VRIO process (P=12; n=1). Due to the low attendance of focus group three, we also sent out a form to collect qualitative responses surrounding the debrief and results of form two (P=12; n=3). Due to the limited participation in this final step, we were unable to code responses, but we were able to continue to build context surrounding the resources emphasized by the Executive Board and their perceptions of the effectiveness of these resources. This is crucial when triangulating additional data sets from the study, as the juxtaposition of the Executive Board's perception against the needs of the larger membership will help focus recommendations.

### ***Member-Wide Survey Analysis Process***

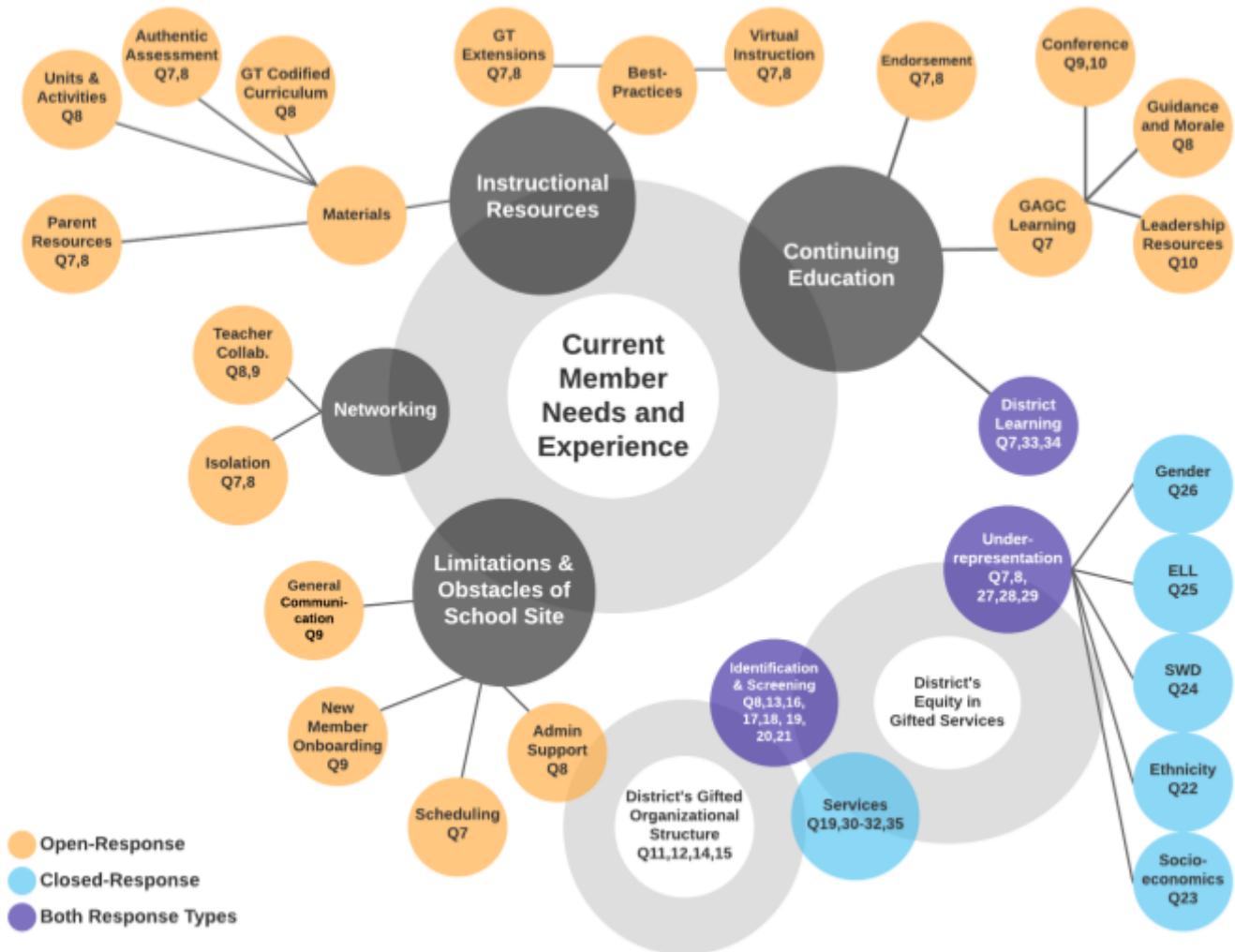
Our third data set operates from the focus of the larger membership of GAGC. We found it important to not only focus on the voices of the Executive Board but also on the members that receive the results of the Executive Board's hard work as this impacts the greater student population that GAGC serves. It is critical to note that the central focus of this study is not to identify current external challenges; rather, we are using this data set to help us understand potential breakdowns in the current capabilities of GAGC and places of friction where assumptions of support by the Executive Board may or may not be felt throughout the larger membership numbers. Additionally, this data can begin the conversation when making preliminary recommendations about where GAGC must focus their efforts to serve their membership.

When reviewing the responses to this survey, we felt it critical to first cluster responses based on axial codes generated from the responses (Leedy & Ormrod, 2016). We then conceptualized the focus of the questions posed via concept mapping (Babbie, 2017). This not only provided clarity in the intention of the question, but allowed us to understand recurring themes presented by the larger membership. While quantitative items were coded prior to delivering the survey, we noticed that in



questions 7-10, our open response items, many of these same codes surfaced. Thus, **Figure 13** is a result of coding and concept mapping the full survey.

**Figure 13.**  
*Concept mapping of member responses to Member-Wide Survey*



### *Preliminary Results*

Preliminary results indicate, when observing the map, that GAGC can work to moderate most of the current challenges in the Gifted Education landscape through direct member support: via continuing education efforts, networking, the coordination of instructional resources, and helping abate the limitations and obstacles that occur frequently within districts. While we know GAGC is not



the governing body in charge of district operations, we also identified that rerouting efforts to continuing education for district leadership might also help mitigate some of the current experiences expressed by members who completed the survey.

As survey responses were limited in number (P= approx. 1,100; n=66), results from this data set were cautiously applied to the findings and recommendations portions of the study; however, this limited response rate may also provide a signal that digital survey data collection does not best serve the members of GAGC and thus, other means of understanding the needs of the larger membership should be explored by the Executive Board.

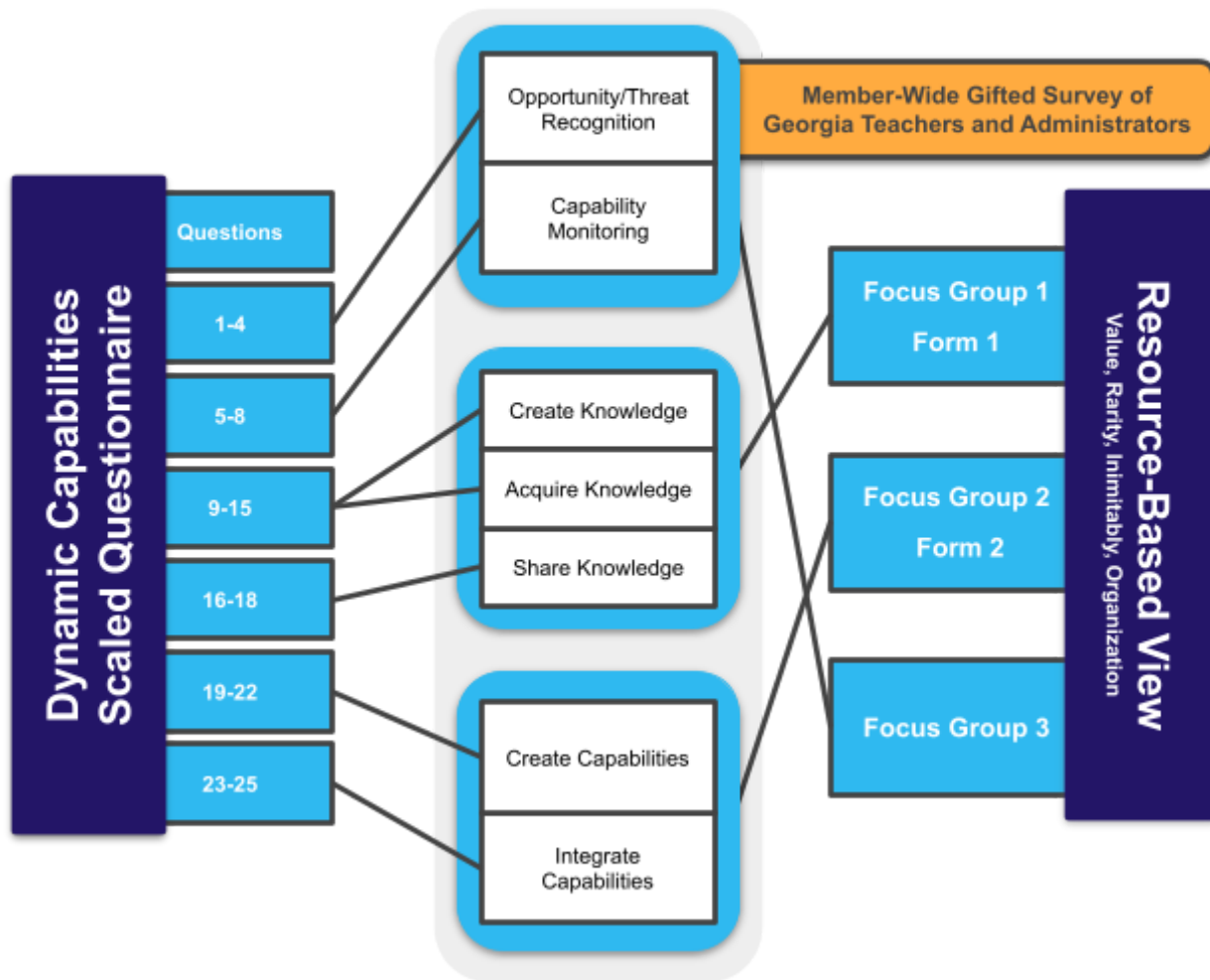


## Data Triangulation and Framework Coupling

As the data discussed previously occurs in three different spheres, we felt it important to clarify the triangulation that occurred when synthesizing this raw data together into one series of findings.

**Figure 14** exhibits our triangulation plan. The DCF operates as the backbone of our approach, which will be an essential thematic feature when discussing our findings and recommendations.

**Figure 14.**  
*Triangulation of Data Collection and Analysis Methods*



The Dynamic Capabilities Scaled Questionnaire, delivered via cognitive interview and digital questionnaire to the Executive Board, provides a snapshot of the entire GAGC process for improvement, helping us understand the perceptions of the board and their ability to respond



effectively to external challenges. This data set is limited to the process of the Executive Board but does not explore the actual resources leveraged to create a response to challenges; therefore, the RBV VRIO data series assists in understanding specific clusters of the DCF that could be leveraged by the Executive Board when responding to challenges based on the resources at their disposal. Additionally, to provide context for the study's recommendations, the Member-Wide survey acts as a tether to the realities for the GAGC Executive Board and the greater membership as they work to serve Gifted and Talented students in the state of Georgia. The member-wide survey also allows us to move outside the smaller Executive Board to identify needs and contrast those to the assumptions of the board.





## IX. Findings and Analysis

The capacity building of GAGC is currently managed by their Executive Board. Our findings focus on providing insight into the current operations of this volunteer-team as they attempt to manage and grow GAGC’s influence on and support of the greater gifted community of Georgia. We have allocated one finding per stage of the

Dynamic-Capabilities Framework (DCF) -*Sensing, Learning, and Reconfiguring*- for a total of three findings focused on the combined collection of processes that form the system currently managed by the Executive Board when responding to challenges in gifted education.

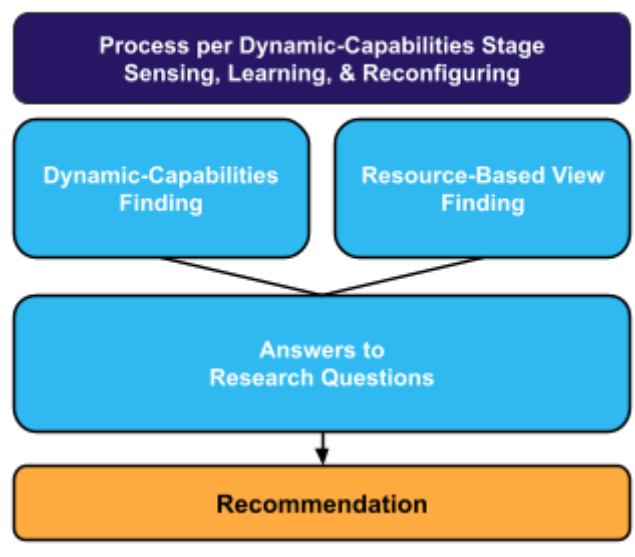
Prior research suggests an interconnectedness of the systems and resources of an organization when attempting to build capacity (Lin & Wu, 2013; Cardeal &

Antonio, 2012). Therefore, we have coupled each DCF finding regarding system management with an Resource Based View (RBV) finding associated with resource management. This coupling of system and resource findings illustrates how GAGC leadership currently manage their processes and resources to support GAGC’s capacity building needs. Please see **Figure 15** for a visual representation of this triangulation and recommendation process.

### SENSING

*As the gifted education landscape changes, what capabilities and resources are currently used by GAGC to identify and understand the needs of their membership?*

**Figure 15.**  
*Synthesis process of Findings to yield Recommendations*





*Sensing* should be a key process for the GAGC Executive Board as they work to support their members throughout the state of Georgia. When considering the context for the *Sensing* stage of the DCF, we focused our attention on organization-specific (i.e. meso level) needs that are accomplished by individuals (i.e. micro level) of the Executive Board (Cardona et al., 2015). Our overarching understanding for this stage is that no strategy can occur without the ability to *Sense*, making this stage in the DCF the most pertinent for GAGC.

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**Finding 1: The Executive Board self-reported being the least effective at systematically recognizing changes in gifted education and routinely monitoring their ability to respond to these changes.**

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*Dynamic-Capabilities Framework, Step 1: Opportunity Recognition.*

*Opportunity Recognition*, or the ability to identify changes in the external environment, is the first step of focus for GAGC (McInerney-May, 2011). In order for GAGC to stay competitive against the external challenges of the gifted education landscape, the Executive Board must be able to recognize the various opportunities and threats that may arise across the state of Georgia (Teece, 2007).

Of the 25 statements GAGC leadership completed in Dynamic Capabilities Questionnaire, statements pertaining to *Opportunity Recognition* had some of the lowest mean scores (see **Table 5** for all questionnaire items connected with this stage). In particular, GAGC's Executive Board scored lowest on the statement "This organization periodically reviews the likely effect of changes in Georgia Education as it connects to teachers of Gifted Students." This lack of routinized, procedural review to identify opportunities to improve the status of Gifted Education in Georgia is problematic, as the adage "You don't know that you don't know" becomes forefront for this NPO.



**Table 5**

*Results from the Opportunity Recognition Step of the Dynamic Capabilities Scaled Questionnaire*

	Item	Question in Scaled Questionnaire	Mean
Opportunity Recognition Framework Step 1	1	This organization is slow to detect fundamental shifts in Georgia education.	5.25
	2	This organization periodically reviews the likely effect of changes in Georgia education as it connects to teachers of Gifted students.	4.00
	3	This organization quickly understands new opportunities to serve their members.	6.00
	4	This organization is very good at observing and anticipating technological trends in Georgia education.	5.25

*Note:* All items in the scaled questionnaire under a 5.5 mean score were most concerning. These means are highlighted in orange.

Executive Board members, in cognitive interviews, grapple with this lack of systematic *Sensing*, further signaling the need to explore *Opportunity Recognition* process building. When focusing specifically on the idea of *routine*, one participant stated, “If you’re going to put the word periodically in there I’m a little more between a 2 or 3 because periodically to me means we look at the calendar, we note when it’s time for something to be changed and we sit down to be sure we are thinking about it with this lens and I don’t think that happens. I think we do respond to things but it never feels very organized and it’s not very predictable” (cognitive interview, October, 2020). What is particularly interesting about this statement is that this participant suggests they clearly know how periodical *Sensing* should be structured by the Executive Board; however, this participant clearly does not feel that this leadership team has reached the point of such a routine system of *Sensing* processes.

In juxtaposition with the prior response, another participant stated they felt comfortable with the idea of *Opportunity Recognition* as there is a specific Executive Board role allocated to working with legislators and “keeping an ear to the ground.” While we acknowledge the capacity of this singular



role, working with legislators to understand the needs of teachers in the Gifted Community is limited only to the perspective of state representatives and ignores many channels of information transference, including the over 1,000 members of GAGC and their experiences in the gifted classroom and larger gifted community. Therefore, this misunderstanding of how to gather information that possibly signals a challenge to the gifted community could be detrimental if GAGC allocates time and energy to this process via a single role. This further illustrates, as we have discovered, small NPOs who are attempting to increase impact, cannot rely on a single role to complete such a critical task like *Sensing*.

Cognitive interviews highlight the need for more individuals to participate in the *Sensing* stage, particularly *Opportunity Recognition*. According to Participant Two, when contextualizing their rating of statements regarding this stage in the Sensing process, “[GAGC] quickly understands new opportunities to serve their members, I wish it was a seven but it's probably not. I think we're probably more along the line of a 5 just because as an organization, I should say more as a board, we're volunteers that have full-time jobs doing other things so we may learn of an opportunity and bring it to the board but as far as turning that around to our members that could definitely be a place we improve” (cognitive interview, October, 2020). Echoing the results of prior research, this insight truly emphasizes the importance of reconsidering how volunteers are leveraged due to the struggle of small NPO capacity building (Bates, 2012; Brudney & Luca, 2009; Hirschman, 1958). Fully realizing this struggle of limited volunteer time signaled to us that we should work to support this new Executive Board to build more routine processes coupled with additional resources to further extend their reach when looking to recognize opportunities to provide support to their larger membership.

*Dynamic-Capabilities Framework, Step 2: Capability Monitoring.*

In addition to *Opportunity Recognition*, GAGC must focus on *Capability Monitoring*, or the internal surveillance of existing capabilities, to ensure processes managed by the Executive Board



are effective and efficient (MacInerney-May, 2011). The ability of GAGC leadership to monitor the current organization of their processes and resources serves as a secondary *Sensing* signal for the Executive Board and will be crucial in the later *Reconfiguration* stage. Additionally, *Capability Monitoring* aids GAGC leadership in developing new processes in an effort to obtain their desired capabilities as an NPO. Efficient monitoring, including a routine revisiting of current capabilities, assists an NPO in finding places of growth and improvement when serving their community. Therefore, intentional management of this portion of the *Sensing* stage is critical for the maintenance and continual improvement of an organization.

**Table 6**

*Results from the Capability Monitoring Step of the Dynamic Capabilities Scaled Questionnaire*

Item Question in Scaled Questionnaire			Mean
Monitoring Framework Step 2 & 7	5	This organization regularly checks the quality of their ability to function in comparison to other gifted organizations.	5.25
	6	This organization regularly checks the quality of their ability to function in comparison with other non-profit educational organizations.	4.00
	7	This organization pays great attention to monitoring the change of their abilities to function.	6.00
	8	After changing existing capabilities or integrating new capabilities, this organization pays great attention to monitoring the efficiency of new processes.	5.25

*Note:* All items in the scaled questionnaire under a 5.5 mean score were most concerning. These means are highlighted in orange.

When reviewing the items from the Dynamic Capabilities Questionnaire associated with this step (see **Table 6**), the mean scores for each item varied. While the Executive Board felt they “pay great attention to monitoring” they also reported they do not compare their quality against similar NPOs. Participant Two from the cognitive interviews clarified the struggle of comparison, as “Well you know I don't feel like we have a lot of competition. There are other state organizations...so many different states are in different situations, so it's hard to compare that, but I would say we're not real good at that. I don't feel like as an organization that we're laser focused on that right now” (cognitive



interview, October, 2020). This participant acknowledges how isolated GAGC is in their current state. With very little competition, the Executive board does not engage in outward thinking, observation, and evaluation of similar organizations, generating further isolation of the Executive Board and greater membership.

While this is understandable- GAGC being the predominant gifted organization in Georgia- this type of thinking may also lead to a form of complacency that is traditionally ruinous for organizations in the for-profit sector (Hu et al., 2016; Kohli & Jaworski, 1990). Therefore, when making recommendations for GAGC, instilling a sense of urgency from the for-profit sector, by pushing this outward observation of similar organizations, will be beneficial to the Executive Board's monitoring processes.

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**Finding 2: While the Executive Board expends energy to maintain high volumes of connections to external organizations, this energy does not consistently result in member support due to the limited management of these connections.**

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Before discussing how GAGC leverages external relationships, it is important to remember that prior research indicates smaller NPOS are typically more resistant to working with larger organizations to reach their shared visions (Child & Gronbjerg, 2007; Guo & Acar, 2005; Foster & Meinhard, 2002). The potential for loss of autonomy is often overwhelming for small NPOs and leaders of these NPOs often lack the managerial capacity to maintain relationships once initial connections are established (Guo & Acar, 2005). The awareness of the limitations of an all-volunteer board was crucial to this finding, as more relationships may not yield better results; however, rich relationships may be better for GAGC's needs.

GAGC's Executive Board reports a large volume of *Cooperative Alliances* with major organizations. Five out of the nine most valuable resources identified in the RBV process revolve around *Cooperative Alliances* between GAGC and the following: Georgia Department of Education



(GADOE), Georgia Legislators, Georgia School Districts, Georgia Institutions of Higher Education, and the National Association for Gifted Children. Furthermore, GAGC leadership recognizes their relationship with the GADOE as their most valuable resource, scoring a 3.86 out of 4 on a 4-point scale. See **Table 7** for more information.

**Table 7**  
Results from VRIO Form 1 connected to Cooperative Alliances

Code	Resource	Value	Rarity	Inimitability
	Ability to work on initiatives alongside GA DOE	3.86	2.71	2.29
	Capacity to communicate and collaborate with the GA Legislature	3.71	2.86	2.43
	Connections to school communities (RESA, School Leaders/Teachers, and/or Parents)	3.71	2.57	2.43
	Relationship with Higher Ed organizations in GA	3.29	3.14	2.43
	Connections to and Recognition by National Organizations	3.14	2.71	2.29

Note: Results are organized based on highest value mean and are coded similarly to **Figure 12** to contrast the resource identified to the original RBV framework. The color coding of the original RBV framework will be carried throughout the entire RBV analysis discussion. To view this table with all resources included, please reference **Table 3**.

While GAGC has key *Cooperative Alliances* already established, the Executive Board self-reported lower organizational efficiency and impact related to these alliances in comparison to other resources identified under the *Specialized Know How* and *Reputation* category (see **Table 8** for results). This prompted us to explore these conflicting results, as a resource that is perceived as highly valuable is often also the one leveraged to make the most impact.

**Table 8**  
Results from VRIO Form 2 connected to Cooperative Alliances

Code	Resource	Efficiency	Impact
	Connections to and Recognition by National Organizations	3.57	3.71
	Capacity to communicate and collaborate with the GA Legislature	3.43	3.43
	Connections to school communities (RESA, School Leaders/Teachers, and/or Parents)	3.43	3.71
	Ability to work on initiatives alongside GA DOE	3.38	3.25
	Relationship with Higher Ed organizations in GA	3.29	3.14

Note: Results are organized based on highest value mean and are coded similarly to **Figure 12** to contrast the resource identified to the original RBV framework. The color coding of the original RBV framework will be carried throughout the entire RBV analysis discussion. To view this table with all resources included, please reference **Table 4**.



What we identified from the RBV echoes the results of Finding 1, as much of the *Cooperative Alliance* efforts are left to a single role in the organization, reducing GAGC's overall impact due to a lack of capacity. Participant One, when discussing the capacity of the Legislative Liaison role maintaining an alliance with key Georgia Legislators, stated "For example, with legislation, it's not just the legislative liaison who has to do that. They can't do all that so there's kind of a sense of, if someone's going through something or they're busy or we know they're occupying this office but it's really not their best niche. How do we make up for that and then pitch in..." (cognitive interview, October 2020). Thus, individual members of the organization are aware of the struggle to maintain *Cooperative Alliances*, but have yet to decipher a system in which *Cooperative Alliance* maintenance can serve the shared vision of GAGC.

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## LEARNING

*As the needs of members are identified, what capabilities and resources are currently in place to help GAGC learn and share information among their membership?*

*Learning*, as the second stage of the DCF, focuses on the processes of creating, acquiring, and sharing knowledge throughout the organization (MacInerney-May, 2011). This stage focuses on the requirement to create and continually improve the process of understanding the management ability of the Executive Board.

It is important to note, that while this organization supports the education environment, this stage is not primarily focused on the dissemination of best practices in the gifted classroom; rather, this stage focuses on the internal mechanisms of the Executive Board to learn to build capacity of the organization when processes are not currently established. A result, however, of effective management by the Executive Board, is the increased *Learning* of its members regarding how to support the gifted community in Georgia.





This stage requires the Executive Board to explore ideas presented by prior research regarding the management of complexities in their system, including the *Who*, *What*, and *How* of their learning processes (Castillo, 2019; Cardona et al., 2015). Effectively, *Learning* is exploring how the Executive Board gathers new knowledge to be ever more effective in their leadership role of GAGC. Our conclusion for this stage is that while learning is occurring, the GAGC Executive Board's current *Learning* capacity does not operate in a way that meets member needs.

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**Finding 3: The creation and acquisition of learning processes is non-systematic; therefore, the sharing of knowledge is a daunting task for the Executive Board.**

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#### *Dynamic-Capabilities Framework, Step 3: Knowledge Creation*

*Knowledge Creation* is defined as the ability to create new knowledge internally within the organization (MacInerney-May, 2011). Internal learning is essential to GAGC leadership and its greater membership, as internal creation improves the effectiveness and efficiency of responding to external challenges which can ultimately lead to widening the support of gifted communities across the state of Georgia (Iansiti & Clark, 1994). Teece (2007) highlights that internal learning, as opposed to the external acquisition of knowledge, is more essential for developing and improving capabilities; therefore, exploring this type of learning was crucial to our study. While GAGC is an NPO in the education sector, *Learning* as an internal process is the ability of GAGC's Executive Board to observe and critique their own ways of building knowledge to manage their organization.

GAGC's Executive Board identified, in their responses to the Dynamic Capabilities Questionnaire, a strong agreement with statements associated with *Knowledge Creation*. However, what GAGC leadership considers to be *Knowledge Creation* is limited due to their lack of institutionalized systems. When discussing questionnaire items during cognitive interviews, participants were complementary of the greater members, acknowledging that "teachers of gifted students are often gifted themselves" (cognitive interview, October 2020). However, a disconnect



exists among GAGC leadership regarding their understanding of learning and *Learning*. GAGC leadership references that “gifted educators are consistently engaged in learning throughout the year [Professional Learning occurring at the individual member district level]” and while that is important, GAGC’s Executive Board is not currently *Learning* regarding the management of their processes when responding to a challenge presented in the gifted education landscape. This is mostly due to the lack of systematic processes established by GAGC, as a collective, around acquiring, creating and sharing of knowledge.

Additionally, the Executive Board often misinterprets who is acting as the catalyst for *Knowledge Creation* and its importance to the overall knowledge base of GAGC. When asked to discuss item 10, “Within this organization, members have the capabilities to successfully learn new things,” many of the leaders immediately assumed that teachers of gifted education were already equipped with the capability to create new knowledge. While gifted educators may have novel ideas about their needs and how to support the gifted community at large, GAGC’s Executive Board does not currently have a process to create opportunities for members to successfully add their new knowledge to the institutionalized knowledge of GAGC’s Executive Board. Therefore, new knowledge that could become part of the management processes of the organization are lost, further limiting the time and effort of individuals who are volunteering to support the mission of gifted education in Georgia.

#### *Dynamic-Capabilities Framework, Step 4: Knowledge Acquisition*

GAGC’s ability to *Learn* extends beyond internal knowledge when leaders attempt to acquire knowledge externally (Cassiman & Veugelers, 2006). *Knowledge Acquisition* is the ability to gather new knowledge from external sources and is a critical step in the DCF (Lichtenthaler, 2009; Zahra & George, 2002; Eisenhardt & Martin, 2000). The acquisition of new knowledge from external sources coupled with internal knowledge can be utilized to create and enhance the current capabilities of



GAGC (Lyles & Salk, 1996).

**Table 9**

*Results from the Knowledge Creation & Acquisition Steps of the Dynamic Capabilities Scaled Questionnaire*

Item Question in Scaled Questionnaire			Mean
<b>Knowledge Creation &amp; Acquisition Framework Step 3</b>	<b>9</b>	The organization's members have the capabilities to produce many novel and useful ideas.	6.75
	<b>10</b>	Within this organization, members have the capabilities to successfully learn new things.	7.00
	<b>11</b>	Members have the capability to effectively develop new knowledge or insights that have the potential to influence Gifted education in Georgia.	6.25
	<b>12</b>	When solving problems, members can rely on strong regional support.	6.00
	<b>13</b>	The organization frequently acquires knowledge about technologies and education trends from outside the organization.	5.75
	<b>14</b>	This organization is able to identify and acquire external knowledge (e.g. evidence-based practice, pedagogy, technology) very quickly.	6.25
	<b>15</b>	Members of the organization regularly visit other Georgia schools to learn about new technologies, trends, or teaching models.	4.00

*Note:* All items in the scaled questionnaire under a 5.5 mean score were most concerning. These means are highlighted in orange.

When GAGC is better able to gain knowledge, the Executive Board can more effectively strengthen their current capabilities to share knowledge across the organization. However, when Participant One was asked whether “the organization is able to identify and acquire external knowledge very quickly” they responded with, “...it's hard for me...I guess it is the organization but I also think it's the executive board members. We've got a lot of board members with PhDs which [acquiring external knowledge quickly] is kind of their thing, but I do know that that might be subject to change I guess if you had different people on the board who that was not something they thought was very important” (cognitive interview, October 2020). This awareness, of volumes of internal knowledge with the capacity to gather external knowledge, is crucial for leaders among the Executive Board. Participant One clearly suggests that the current leadership team can acquire knowledge



based on their backgrounds and experience with *Knowledge Acquisition*, but as the organization is currently structured, this ability is highly dependent on the person in each Executive Board role.

Therefore, *Knowledge Acquisition* cannot be considered a process at this time.

When comparing the self-reported scores for *Knowledge Creation and Acquisition* of the questionnaire with the data collected during our cognitive interviews, the Executive Board reports high mean scores for the Dynamic Capabilities Questionnaire; however, as noted in previous sections, this may be due to the high volumes of reliance on specific skills of current board members rather than the systematic processes expected during the *Learning* stage. Additionally, the current *Learning* capacity of GAGC is diminished by the limited avenues for internal creation and external acquisition of knowledge, be it from members of GAGC or external relationships to GAGC. With no systematic process in place, critical contributions from the greater membership are unable to integrate with the prior knowledge of GAGC.

#### *Dynamic-Capabilities Framework, Step 5: Knowledge Sharing*

*Knowledge Sharing* is the ability to transfer and disseminate knowledge throughout the organization (MacInerney-May, 2011). As internal and external knowledge is built and managed by NPO leadership, knowledge sharing among leadership and the greater membership is vital for enabling collaboration as an organization (Grant, 1996; Cohen & Levinthal, 1990). In order for NPO leaders to appropriately use the new knowledge they acquired from various resources, this knowledge must be integrated into the current processes of the organization (Zahra & George, 2002). As a result, the development of new capabilities is dependent upon the leadership's ability to share knowledge with the greater membership (Kogut & Zander, 1996).

GAGC's process for sharing knowledge is currently limited in scope. When speaking to the Executive Board, much of their *Knowledge Sharing* distills into a single two-day conference held mid-academic year. While members report that this convention is fruitful for their continuing



education, this isolated event cannot be the only knowledge transfer method for the greater membership if the Executive Board wishes to serve the membership while they tackle external challenges of gifted education throughout the year. One member added, “I know they [GAGC] do great work, but I am not sure what they are currently working on or all the resources that they provide” (member-wide survey, Fall 2020). Another member added that they “wished GAGC offered more ongoing resources beyond the yearly conference, such as webinars, throughout the year” (member-wide survey, Fall 2020). Additionally, another member echoed the same sentiments, “Resources, resources, resources! It would be great if we could collaborate with other teachers, have a resource database for all types of learners, and just better GAGC communication in general” (member-wide survey, Fall 2020). The greater membership recognizes that GAGC has resources and knowledge to share but are unable to acquire that knowledge currently from the organization beyond the conference.

**Table 10**

*Results from the Knowledge Sharing Step of the Dynamic Capabilities Scaled Questionnaire*

Item Question in Scaled Questionnaire			Mean
Knowledge Sharing Framework Step 4	16	Existing knowledge (e.g. education or technology) is readily available to each member within the organization.	5.75
	17	This organization periodically circulates codified knowledge in the form of documents (e.g. reports, newsletters) to update their members.	5.25
	18	When something important happens (education, legislative, or technological development), the whole organization knows about it in a short period.	6.00

*Note:* All items in the scaled questionnaire under a 5.5 mean score were most concerning. These means are highlighted in orange.

The Executive Board exposed this same concern when completing the Dynamic Capabilities Questionnaire, as they identified a lower mean score for *Knowledge Sharing* than of any other *Learning* step. Item seventeen, as seen in **Table 10**, is of particular note, as the Executive Board recognized they do not “periodically circulate[s] codified knowledge in the form of documents (e.g.



reports, newsletters) to update their members.” In addition, Participant One mentioned in their cognitive interview, “...we don't seem to have a lot there [GAGC website]. We have things you can link to which is great and maybe that's enough -I don't know- but I don't think that our web page is updated with research articles on certain subjects or links to that [reports, articles, newsletters], so it's available because we'll tell you [GAGC members] go to NAGC [National Association for Gifted Children] and find it but it's not quite the same” (cognitive interview, October 2020). This further highlights that rather than depend on one annual conference, GAGC must work to systematically collect and disseminate new knowledge throughout the year for its greater membership.

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**Finding 4: Based on the reputation of the Executive Board, members feel that GAGC is an influential learning resource for teachers throughout the state; however, this influence is limited beyond their annual conference.**

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*Reputation* is a resource that is built based on consistent positive experiences internally and externally to the organization (Drnevich & Kriauciunas, 2011; Teece et al., 1997). Boyd and Richardson (2009) highlight that *Reputation* cannot be bought but instead can only be enhanced through the careful nurturing of the various interdependent and complex relationships of an organization. However, nurturing of these relationships depends heavily on the management ability of NPO leadership.

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**Table 11**  
Results from VRIO Form 1 connected to Reputation

Code	Resource	Value	Rarity	Inimitability
	A history of change and success in gifted education and research	3.71	3.43	3
	Size and influence of GAGC general membership	3.43	3	2.86

*Note:* Results are organized based on highest value mean and are coded similarly to **Figure 12** to contrast the resource identified to the original RBV framework. The color coding of the original RBV framework will be carried throughout the entire RBV analysis discussion. To view this table with all resources included, please reference **Table 3**.

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Based on the information gathered through the member survey and the RBV process, the GAGC Executive Board has positioned the organization as a valuable learning resource for gifted



educators across the state of Georgia. The second most valuable resource identified by the GAGC Executive Board was related to their *history of success and research in gifted education*. GAGC has a long history of advocating for legislative policies that positively impact gifted students and educators across Georgia, and the Executive Board finds this to be a valuable, rare, and inimitable characteristic of their legacy (See **Table 11**). One major legislative accomplishment was the passing of the multiple-criteria rule for gifted children of Georgia during the 1995 Georgia legislative session (GAGC Website). This level of *Reputation* generates trust and confidence in the organization by members in the state as well as throughout the country, placing additional strain on the Executive Board to perform to the level needed by their greater membership.

In addition to their legislative advocacy, GAGC has consistently provided its members with an annual conference that allows the organization to showcase best practices in gifted education from leaders and teachers across the state. One member highlighted, “The annual conference is a must! There are so many resources out there and a need to recharge with other professionals doing the same thing. I teach with only one other Gifted educator at my school, so the comradery that is formed is priceless” (member-wide survey, Fall 2020). Due to their *Reputation* in the gifted community, GAGC’s Executive Board is uniquely positioned to respond to external challenges in ways that individual members cannot.

**Table 12**

*Results from VRIO Form 2 connected to Reputation*

Code	Resource	Efficiency	Impact
	A history of change and success in gifted education and research	3.57	3.57
	Size and influence of GAGC general membership	3.43	3.57

*Note:* Results are organized based on highest value mean and are coded similarly to **Figure 12** to contrast the resource identified to the original RBV framework. The color coding of the original RBV framework will be carried throughout the entire RBV analysis discussion. To view this table with all resources included, please reference **Table 4**.

While this *Reputation* has possibly influenced the size of GAGC’s greater membership, it is important to note that GAGC leadership self-reported the size and influence of the general



membership as being less valuable in comparison to their other identified resources. This is possibly due to the current inability to leverage such a large volume of members by the Executive Board. As noted in prior findings, a lack of systems can make the task of working with greater numbers overwhelming, signaling a need to rebuild systems to utilize the capacity of the greater membership.

Additionally, GAGC self-reported the organizational efficiency and impact of their general membership as lower in comparison to the resources identified in the Specialized *Know How* category (See **Table 12**). This finding highlights that while GAGC has the potential to be a key *Learning* resource throughout the state of Georgia, without a systematic process in place to effectively leverage the size and influence of the GAGC general membership, GAGC will continue to underutilize one of their most valuable resources.

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## RECONFIGURING

*When GAGC learns in response to new challenges in gifted education, what capabilities and resources are currently in place to help GAGC evolve to support member needs?*

*Reconfiguring*, the final stage of DCF, focuses on the capacity to integrate processes into the overall system of an organization as it responds to challenges presented (MacInerney-May, 2011). This stage works to add the knowledge created and acquired from the *Learning* stage into the functionality of the organization as they work to respond to external challenges. GAGC's current *Reconfiguring* capacity is problematic for their Executive Board as there are few processes in place to systematically respond to external challenges. Therefore, *Reconfiguring* is an ambiguous process; leadership may want to become more responsive, but they are not quite sure where to begin.

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**Finding 5: The Executive Board self-reported being highly effective in managing the creation and integration of new processes; however, the lack of routine, systematic recognition and monitoring of changes in gifted education hampers their drive to add new processes.**

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### *Dynamic-Capabilities Framework, Step 6: Capability Creation*

*Capability Creation* is the ability to internally build new processes. This specifically relates to an organization's ability to transform existing resources and processes in a new way (Teece, 2007; Carlile, 2004; Henderson & Clark, 1990). Furthermore, the ability to recombine existing capabilities into novel combinations drives the development of new operational capabilities (Eisenhardt & Martin, 2000; Zander & Kogut, 1995). As leadership of an NPO engages in the modification and improvement of existing capabilities, they strengthen their organization's capacity for *Reconfiguration* (Helfat & Peteraf, 2003).

Working directly with the Executive Board has brought to light the struggles of *Reconfiguring* when traditional leadership roles are present but not meeting the needs of the organization. When discussing *Reconfiguring* in a cognitive interview, one participant noted, "I think that we are kind of stuck in our organizational setup. This person does this, this person does this, you know we do combine when we come together to do conventions...but it's not really a new way, this is the way we've always done it" (cognitive interview, October 2020). It appears that, rather than working to reconfigure as needs of the gifted community are presented, GAGC's Executive Board does not question the roles they are asked to fill upon appointment to each position. This type of approach confines these highly-productive, talented individuals into spaces where they are not able to leverage their talents to serve the greater membership.

This confinement directly contrasts the questionnaire results of the entire Executive Board. As noted in **Table 13**, GAGC leadership scored the organization as effective in their current capacity to *Reconfigure*. Our assumption is that, similar to the *Learning* stage, the idea of "knowledge" from the statements presented in the questionnaire was rooted in best practices of the classroom and not capacity and systems thinking as a leadership board managing a larger organization. When working with Participant One in their cognitive interview, they stated "The organization's members are able to



identify valuable organizational components connect and combine them in new ways, yes and again I think of the Executive Board or other board members that are sort of actively involved in some kind of leadership role, and again some of it's because we're an organization for gifted educators but this is something everybody [GAGC Executive Board] loves to do" (cognitive interview, October 2020).

**Table 13**

*Results from the Capability Creation Step of the Dynamic Capabilities Scaled Questionnaire*

Item		Question in Scaled Questionnaire	Mean
Capability Creation Framework Step 5	19	This organization is effective at transforming existing knowledge into new resources (e.g. new pedagogy/learning strategies, new professional development, new technical equipment).	5.50
	20	The organization's members introduce innovative changes that lie outside the current opportunities and abilities of the organization.	6.75
	21	The organization's members are able to identify valuable organizational components, connect, and combine them in new ways.	6.00
	22	This organization can effectively recombine current abilities and strategies into innovative combinations.	6.00

*Note:* All items in the scaled questionnaire under a 5.5 mean score were most concerning. These means are highlighted in orange.

Our largest realization in this section of the DCF is that individual Executive Board members are highly productive and responsive in their own environments; however, as the roles of the Executive Board are often ambiguous, their current collective efforts are not representative of their fullest capacity. This potential mismanagement of effort is a crucial area to further explore, as the board will not be able to respond to multiple threats to the gifted community if they cannot leverage their full capacity as a leadership team.

*Dynamic-Capabilities Framework, Step 7: Capability Integration*

*Capability Integration* is the ability to include new processes into the organization's existing system, connecting and linking new capabilities with existing resources and processes (Teece,2007; Eisenhardt & Martin, 2000; Teece et al., 1997; lansiti & Clark, 1994). *Capability Integration* is an



important step for leaders working to develop an NPO, as the ability to manage and integrate new capabilities without negatively impacting their current operations is critical (Iansiti & Clark, 1994).

Participants in the cognitive interview process acknowledged a duplicitous nature to this aspect of GAGC’s Executive Board. When thinking about sharing best practices among one another regarding gifted education, Participant One indicated that, “[GAGC] can effectively integrate new externally sourced strategies and combine them with current strategies into innovative combinations, ... and [the GAGC Executive Board] can and I’m sure sometimes we do” (cognitive interview, October, 2020). The entire Executive Board, in the scaled questionnaire, indicated similar thinking (see **Table 14** for results). On the seven-point scale, the team scored this section, on average, among the highest capabilities of their Executive Board.

**Table 14**  
Results from the Capability Integration Step of the Dynamic Capabilities Scaled Questionnaire

Item Question in Scaled Questionnaire			Mean
Capability Integration Framework Step 6	23	The organization's members integrate new and existing ways of doing things without stifling your primary role inside your school district.	6.00
	24	This organization can effectively integrate new externally sourced strategies and combine them with current strategies into innovative combinations.	6.50
	25	This organization can successfully integrate the new knowledge acquired with their existing knowledge.	6.25

*Note:* All items in the scaled questionnaire under a 5.5 mean score were most concerning. These means are highlighted in orange.

However, when further considering the nature of the prompt, Participant One also indicated, “but if it had been worded where it was you know systematically effectively integrates - I would not give it as high. So the capability is there, it happens, but I don't know that it's a focus of trying to seek those out and put them into some kind of combination” (cognitive interview, October 2020). Therefore, while this board of incredibly capable individuals are working to weave best practices into their work, the consistency that would prevail due to a systematic approach is not there as of yet.



**Finding 6: Limited understanding regarding the role of leadership in managing small NPO capacity building will affect the Executive Board’s ability to create and integrate new processes in response to external challenges and/or member needs.**

*Specialized Know How* is a resource focused on the collective knowledge of an organization. This type resource cannot be bought, but rather is a resource that must be built within the NPO and may only be developed over a period of time (Malik & Kotabe, 2009). While GAGC has extensive *Specialized Know How* in areas pertaining to gifted education, GAGC lacks extensive knowledge in regards to organizational change management of small NPOs. To be clear, this is not a lack of knowledge among the current board, but is rather a lack of collective knowledge over time regarding how to gain new ideas to manage and lead small NPOs.

**Table 15**  
Results from VRIO Form 1 connected to *Specialized Know How*

Code	Resource	Value	Rarity	Inimitability
	Diversity Equity and Inclusion Work (e.g. Anti-Racism Statement)	3.71	2.86	2.71
	Network Capacity of Executive Board	3.29	2.86	2.43

Note: Results are organized based on highest value mean and are coded similarly to **Figure 12** to contrast the resource identified to the original RBV framework. The color coding of the original RBV framework will be carried throughout the entire RBV analysis discussion. To view this table with all resources included, please reference **Table 3**.

**Table 16**  
Results from VRIO Form 2 connected to *Specialized Know How*

Code	Resource	Efficiency	Impact
	Diversity Equity and Inclusion Work (e.g. Anti-Racism Statement)	3.86	3.86
	Network Capacity of Executive Board	3.57	3.57

Note: Results are organized based on highest value mean and are coded similarly to **Figure 12** to contrast the resource identified to the original RBV framework. The color coding of the original RBV framework will be carried throughout the entire RBV analysis discussion. To view this table with all resources included, please reference **Table 4**.

Based on the RBV process, the Executive Board reported two major *Specialized Know How* resources, their networking capacity and their Diversity, Equity, and Inclusion Coalition for Gifted Education, as seen and rated in **Table 15**. These resources, while incredibly valuable in their own



right, do not indicate that the Executive Board currently has the *Specialized Know How* to generate systems thinking. Insight as to how to manage a small NPO is a necessary resource for the Executive Board if they wish to manage and steward the small NPO for its greater membership.

**Tables 15 and 16** also indicate that the Executive Board views their own networking capacity as a lower ranked resource for the organization; however, when considering the type of work expected of small NPO leadership, networking is crucial and cannot be bought or artificially constructed. Through networking, GAGC's Executive Board could overcome gaps in their current processes they have identified, such as their want for more effective *Cooperative Alliances* and *Specialized Know How*. Therefore, while networking is rated low compared to other current resources, in a new, systems-thinking approach, networking might deliver more impact for GAGC.

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### *Limitations*

Most of our limitations are the result of low participation numbers for each of our data collection methods. As we were asking for support from members of GAGC who were already overstretched, in particular the Executive Board, this was to be expected. Therefore, we have cautiously applied our results to our findings and our findings to our recommendations. To remain as transparent as possible regarding our limitations, we have broken this portion of our work into each data collection method and analysis process.

### *Dynamic-Capabilities Framework*

When working within the DCF data collection and analysis procedure, multiple potential limitations have affected the results of this study. Firstly, adapting MacInerney-May's (2011) tool for studying the DCF among the leadership of GAGC is not without error. We attempted to mitigate any confusing items in this tool via the cognitive interview process; however, in only interviewing two key members of the Executive Board, the results of this method were cautiously applied. Additionally, as



the entire Executive Board did not complete the questionnaire portion of this data collection method, we cannot make larger conclusions regarding perspectives of the board outside of the seven individuals who participated; however, we do feel that, as we received a majority of the members, it was acceptable to proceed with the analysis and findings process based on these results.

#### *Resource-Based View*

As mentioned previously, working consistently with the Executive Board was a challenge. This was particularly true for our RBV process in which we noticed a small decline over time of participation among the Executive Board members. To mitigate potential error due to limited participation, we focused much of our data analysis on the first half of the RBV process as well as the forms completed by the board.

#### *Member-Wide Survey*

The member-wide survey hosted the lowest proportional participation of all three data collection methods. This disconnect of input from the greater membership pushed our team to cautiously identify and apply this data to our findings, as we did not want to presume to understand what the challenges are of the teachers, leaders, and community members in Georgia's gifted community. Therefore, we leveraged these results in our findings and recommendations as possible directions for GAGC's Executive Board to explore further.

#### *Application of Findings to Recommendations*

When working to apply our findings to our recommendations, our team made cautious decisions regarding which RBV VRIO resources to apply in each stage of the DCF. It is important to note, however, that depending on the perspective of the researcher, one could apply each of the VRIO resources to each stage of the DCF. Therefore, the recommendations made provide the greatest leverage changes and opportunities for the Executive Board based on their current time,



resources, and expertise available to the team. As the board grows and shifts roles and tasks among key members, the alignment of DCF stages to RBV VRIO resources may change.



## X. Recommendations

We believe that GAGC has a considerable amount of untapped capacity waiting to be engaged by rerouting time and energy to more intentional processes. Prior research suggests that organizations survive and thrive based on the effective management of processes and resources by leadership (Sun & Anderson, 2010). As our findings have indicated, while the Executive Board is comprised of incredibly talented leaders, the board's lack of systems jeopardizes their consistent ability to identify and respond to challenges faced in the greater gifted community. As education is often unpredictable, being able to grow and flex processes to rise to every challenge presented in the educational landscape is crucial for this board and the survival of GAGC.

GAGC's ability to shift from groupthink leadership to dynamic-capabilities thinking will aid in meeting external challenges. As explained by Weerawardena et al. (2007), "an organization's dynamic capability should reflect its ability to build new and unique capabilities that help identify new opportunities under turbulent conditions and make strategic responses to situational changes more quickly." Therefore, much of what we have provided in our recommendations requires the Executive Board to shift from working as an individualized set of units towards an adept collective system when responding to challenges.

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### SENSING

*As the gifted education landscape changes, what capabilities and resources are currently used by GAGC to identify and understand the needs of their membership?*

Changes in the gifted education landscape have the potential to create capability gaps which can weaken the Executive Board's ability to respond effectively to these changes (Capron & Mitchell, 2009; Lavie, 2006). The identification of external challenges that host the potential to drive changes among member needs is an important signal for GAGC. This signal should encourage the





development of new capabilities among GAGC's Executive Board to help avoid gaps in their organizational capacity, gaps which will result in a disservice to their members. The better able GAGC becomes at recognizing potential opportunities and threats arising from changes in the gifted education environment, the more time GAGC leadership will have to develop new capabilities and completely reconfigure ahead of the challenges that may harm the larger gifted community of Georgia.

*Sensing* cannot depend solely on one individual role in the Executive Board. In part, these volunteer leaders, as noted previously, are already taxed with their full-time roles and have limited bandwidth to support requests that require complex, time and energy demanding responses. Additionally, depending on a singular Executive role leaves capacity to chance, as each individual popularly elected to this position may or may not have the ability to achieve such a high-stakes need for GAGC. Therefore, a system for *Sensing* that is member-centered and uses external resources will not only offload some of the labor of *Sensing*, but will also ensure that GAGC is continually informed regarding the external challenges being faced by members of the organization.

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**Recommendation 1: Develop a system that allows the Executive Board to routinely collect data which will identify challenges in gifted education as well as the needs of their members.**

*Supporting Resource:* Leverage the large volume of external organization relationships identified to support in the recognizing and monitoring of challenges.

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In order for GAGC to more effectively meet the needs of their greater membership, GAGC's Executive Board must create a systematic way of recognizing challenges and opportunities that arise outside of the NPO. Recognition of these challenges, due to the organization's history of supporting gifted classrooms, will likely come from gifted teachers looking for pedagogical support or working to increase equity for their students. Additionally, the Executive Board must work to continually sense what expectations are being presented by governing bodies regarding the education of students in



the state of Georgia. Therefore, the Executive Board’s *Capability Monitoring* must be on-going as external challenges are constantly evolving.

**Figure 16**  
*Recommended cycle of data collection regarding time and topic*

<b>August</b>	<ul style="list-style-type: none"> <li>● <b>Reflection:</b> <ul style="list-style-type: none"> <li>○ What was your biggest [hurdle] last year?</li> <li>○ How did you overcome this [hurdle]?</li> <li>○ What could GAGC have provided to help you overcome this [hurdle]?</li> </ul> </li> <li>● <b>Sensing Challenges:</b> <ul style="list-style-type: none"> <li>○ What type of support do you need in your gifted classroom this year?</li> <li>○ In preparation for the gifted conference: What type of gifted professional learning would you find most beneficial?</li> </ul> </li> </ul>
<b>December</b>	<ul style="list-style-type: none"> <li>● <b>Reflection:</b> <ul style="list-style-type: none"> <li>○ How was this first semester?</li> <li>○ What support did you need from GAGC that you feel was missing?</li> </ul> </li> <li>● <b>Sensing Challenges:</b> <ul style="list-style-type: none"> <li>○ With another semester to go, how can GAGC work to support your needs in the classroom?</li> </ul> </li> </ul>
<b>March</b>	<ul style="list-style-type: none"> <li>● <b>Reflection:</b> <ul style="list-style-type: none"> <li>○ What major learning did you gain from the GAGC convention?</li> <li>○ What do you wish you had learned at the convention that was not offered?</li> </ul> </li> <li>● <b>Sensing Challenges:</b> <ul style="list-style-type: none"> <li>○ What additional instructional resources do you need for your gifted classroom?</li> <li>○ What overall concerns do you have with finishing the year with your gifted students?</li> </ul> </li> </ul>
<b>May</b>	<ul style="list-style-type: none"> <li>● <b>Reflection:</b> <ul style="list-style-type: none"> <li>○ How has GAGC supported your work in the gifted classroom?</li> <li>○ How has GAGC failed to support your work in the gifted classroom?</li> </ul> </li> <li>● <b>Sensing Challenges:</b> <ul style="list-style-type: none"> <li>○ What type of support would you like to have when you return to your classroom in August?</li> </ul> </li> </ul>

*Note:* The questions provided are topic recommendations. GAGC’s Executive Board should format these topics in question structures that are easily analyzed for the capacity of the board.

This need for continual monitoring requires the Executive Board to generate a system of probes that are pushed out to the membership in routine intervals to ensure that communication lines remain open and flowing back to the Executive Board. The traditional anecdotal check-in with known members does not serve the larger membership as a whole and leaves a gap in service to members



who have yet to come in contact with leadership inside the Executive Board. We recommend a data collection series that requires members to reflect as well as participate in the *Sensing* of challenges. This technique retools the for-profit idea of competition against other FPOs as competition to meet the needs of members in a challenging educational environment. Establishing a system of broad spectrum data collection should help generate the sense of urgency for the Executive Board to propel monitoring and meet the needs of all their members (Hu et al., 2016; Kohli & Jaworski, 1990). Potential topics for this series, as well as timelines, can be seen in **Figure 16**.

In addition to the data collection series, GAGC Executive Board members already have several key *Cooperative Alliances*. Due to the individual reputations and connections of Executive Board members, additional partnerships, when needed, are more likely to form when the organizations are closely tied together through leader relations (Brown & Guo, 2010; Guo & Acar, 2005; Miller-Millesen, 2003; Middleton, 1987). Therefore, a preliminary recommendation is to ensure that members selected and approved for the Executive Board bring relationships to the team that will contribute to *Cooperative Alliances* in the future (Ancona et al., 2009).

When attempting to leverage *Cooperative Alliances*, literature regarding NPO capacity building highlights that smaller NPOs can benefit greatly from partnering with other organizations, particularly larger and more financially secure organizations (Child & Gronbjerg, 2007; Guo & Acar, 2005; Foster & Meinhard, 2002). Research cautions that establishing and maintaining these *Cooperative Alliances* requires NPO leadership to increase their managerial capacity to ensure that these relationships are further cultivated and not become stagnant (Kor & Mesko, 2013). Therefore, in order to benefit from these relationships, GAGC must work to move beyond the initial effort of making relationships with external organizations to growing these partnerships to benefit GAGC's needs. We recommend, to ensure a distribution of effort and the ability to grow partnerships, that each member of the Executive Board should be associated with at least one partnership to distribute the lift of this tactic.



Leveraging *Cooperative Alliances* allows GAGC to better *Sense* throughout the education sector. Robust organizations are able to provide additional warnings to changes that could affect the well-being of the community GAGC wishes to serve. This strategy, of sharing the task of *Sensing* with larger, external organizations, allows the Executive Board to create “dense networks inside and outside” with “connections to experts, top management, or university researchers doing work that could help” GAGC better recognize and monitor (Ancona et al., 2009). Participant One of our cognitive interviews, furthers the potential impact of this tactic by stating, “[this perspective] takes us out of just the idea we’re a gifted education organization in Georgia to ‘okay we’re an organization that could function better and can learn from others’...I think that’s a valuable thing” (cognitive interview, October 2020). Activating these external relationships to increase *Sensing* of challenges in the gifted education landscape will boast particularly strong results when in alignment with Recommendation Three, in which we discuss how *Reconfiguring* will further strengthen the organizational efficiency and impact related to their various *Cooperative Alliances*.

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## LEARNING

*As the needs of members are identified, what capabilities and resources are currently in place to help GAGC learn and share information among their membership?*

Based on the findings of our study, the interconnected nature of *Sensing* and *Learning* is essential to GAGC’s capacity building. GAGC’s Executive Board must use the *Learning* stage as a response method to the challenges identified via internal and external *Sensing*. Therefore, clear processes that encourage the Executive Board’s effective management of the strong networking capacity and external relationships must be in place to support knowledge creation, acquisition, and sharing for the greater GAGC membership.

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**Recommendation 2: Create codified processes to acquire and routinely share knowledge across the entire Georgia gifted community.**

*Supporting Resource:* Leverage the networking capacity of the Executive Board to form impactful, internal relationships within the Georgia Association for Gifted Children.

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Based on the data collected during GAGC's ongoing *Sensing* stage, GAGC leadership must build a systematic way of creating, acquiring, and sharing their new knowledge with the greater membership. The greater membership recognizes that GAGC has extensive *Specialized Know How*, however, the Executive Board does not currently have an avenue through which they can consistently and effectively share their collective knowledge. It is important to note that the organization will feel little motivation to *Learn* if they do not see what challenges exist in the gifted education landscape. Therefore, the process of *Learning* can only occur as a result of more effective *Sensing*. The newly created and/or externally acquired knowledge is GAGC's response to their identification of challenges for the gifted community across Georgia.

Due to the Executive Board's strong networking skills, we encourage the board to identify places in which they can offload additional learning opportunities to other members of the organization. The Executive Board should look to find individuals of the larger membership who can help accomplish learning goals throughout the year rather than volunteers who just support the annual conference. This can only be accomplished if the Executive Board hosts sessions in which *Learning* is a key discussion among these newly acquired personnel, clarifying that *Learning* is not just about the end result of gifted pedagogy but is also focused on GAGC's ability to work together to learn how to serve their members more effectively.

Equipping additional members will serve the Executive Board as leaders attempt to restructure to meet the needs of members. When referencing **Figure 17**, an example of this type of approach is the Regional Representative Institute in which the Executive Board could train others to *Learn*



alongside the Executive Board about the ways in which they should work to create and acquire knowledge needed for the larger membership.

**Figure 17.**

*Recommended action to facilitate increased communication and learning*

Fall	Executive Board	Regional Representative Institute
	Regional Representatives	Back-to-School Professional Learning Seminar
	Larger Membership	File sharing instructional materials and activities
Spring	Executive Board	GAGC Annual Convention
	Regional Representatives	Regional Annual Conference Extension
	Larger Membership	File sharing instructional materials and activities
Summer	Executive Board	Annual Executive Board Conference
	Regional Representatives	Gifted EdCamps for Teachers
	Larger Membership	File sharing instructional materials and activities

*Note:* This table provides a series of options for the various levels of leadership to contribute to the learning of the greater organization.

This type of plan can only be activated by shifting the roles of the Executive Board to facilitators and networkers of the larger membership. Instead of running each learning opportunity presented in **Figure 17**, the Executive Board should work to support additional committees to build and host these learning experiences. This shift of moving from over-taxed, isolated leaders to *Learning* facilitators, will allow GAGC’s Executive Board to create new capabilities of *Learning* and integrate those capabilities into the greater organization at large. As a result, GAGC will better be able to handle the increased demand for *Learning* and extend their learning beyond the traditional routine of a single annual conference.



## RECONFIGURING

*When GAGC learns in response to new challenges in gifted education, what capabilities and resources are currently in place to help GAGC evolve to support member needs?*

As GAGC begins to *Sense* new challenges to gifted education and then *Learns* how to overcome these challenges, the Executive Board should begin to shift their processes to generate a stronger system that serves member needs. *Reconfiguring* is the point in which the Executive Board diverges from their traditional operations to rise to the challenge of meeting new threats head on via newly acquired and created capabilities. As Light and Hubbard (2004) remind us, ““It is one thing, for example, to say that board development produced a more developed board, and quite another to argue that a more developed board produced a more effective organization, which in turn produced more programmatic outcomes, higher quality service, and so forth” (p.48). All the recommendations of *Sensing* and *Learning* will fall short without the reflective practice of the Executive Board as they work to identify how to *Reconfigure* to meet the needs of the greater organization.

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**Recommendation 3: Restructure and blueprint Executive Board Roles in an effort to build managerial capacity of each leader when responding to challenges in gifted education and needs of the larger membership.**

*Supporting Resource:* Leverage the reputation of GAGC’s Executive Board to recruit additional volunteer leaders focused on serving the shared vision of the organization.

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In order to *Reconfigure* as a response to an external challenge, the Executive Board must first be able to identify clear guidelines and expectations for the roles already in play. By not having clear guidelines, the stability of a role is currently solely based on the capability of the individual position holder. This person-dependent method could destabilize the organization based on the capacity of the current and future position holder; therefore, codified expectations of each Executive Board role and how each position fits the shared vision and needs of the organization will be critical.



The following series of questions presented in **Figure 18** can support the reflections of the current Executive Board as they begin to outline each role presently leveraged to support GAGC (Ancona et al., 2009). This set of questions can also aid in the continual reshaping or shifting of roles, be it an Executive Board member, Regional Representative, or a role yet to be identified as a need at this point in time. This type of question series should be revisited at least at the induction of and mid-point of an individual’s term, as visitation and reflection upon these roles may lead to more successful configurations to meet additional challenges of the greater membership. Each new member of the Executive Board should contribute to the running record of these roles via tangible documentation. Effectively, these questions should not be abstract reflections, but rather should be visible blueprints for the current and future members of GAGC.

**Figure 18.**  
*Recommended topics for the blueprint of leadership positions*

<b>Contribution to the Shared Vision</b>	What is the overarching role of this position and how does it connect to the shared vision of GAGC?
<b>Organizational Function</b>	What are the tasks and responsibilities required of this role? Explain these aspects in detail.
<b>Contribution to Sensing Stage</b>	What role does this position play in sensing external challenges of the membership? How will this be realized in the tasks of the position? (e.g. collecting data, exploring data, presenting data to the Executive Board)
<b>Contribution to Learning Stage</b>	What role does this position play in learning to support fellow members across the state? How will this be realized in the tasks of the position? (e.g. managing knowledge collection, organizing knowledge, distributing knowledge)
<b>Contribution to Reconfiguring Stage</b>	What role does this position play in continually aligning GAGC to reach the shared vision of the organization? How will this be realized in the tasks of the position? (e.g. reflection leader, vision casting, capability monitor)
<b>Networking Role</b>	What Cooperative Alliances should this role maintain? What additional networking needs are required of this role?
<b>Legacy Communication</b>	What were the accomplishments of prior members in this position? How can this new member of the Executive Board leverage the legacy of past position holders?

*Note:* This should not be a routine question and answer document. Rather, the GAGC Executive Board should work to brand this blueprint as a living document to fit the needs of the board and boards yet to be appointed in the future.





In addition to these codified roles, it is critical that the Executive Board leverage their *Reputation* as a resource to recruit new, innovative members to the various offices of GAGC. At present, the Executive Board is often filled with members who cycle from role to role rather than moving out of the Executive Board and making space for other members. This cycling, if continued, could diminish the overall capacity of the board to respond to changes, as problems of groupthink and exhaustion take over long-standing board members.



## **XI. Conclusions**

### **Georgia Association for Gifted Children**

Based on our findings and recommendations, we encourage GAGC's Executive Board to approach their roles using systems-thinking, a process that will leverage their talents and the talents of their larger membership to generate greater impact on Georgia's gifted community. We also encourage officers of the Executive Board to redefine roles that no longer suit the needs of their organization, requiring application of a critical and reflective lens for each role as it contributes to the organization. Finally, we hope to see this board find space to become facilitators of capacity building rather than maintainers of order. To achieve their mission and vision of success in supporting the gifted community, their own practices as leaders must shift away from action-oriented workers to strategic coordinators of action taken by the larger membership of GAGC.

When reflecting on the actions of the Executive Board, it is paramount that the organization consider the evidence identified to indicate achievement of their goals. While one initiative may be a signal of potential capacity, a single action or outcome is not necessarily a signal of a system working at capacity. Many small NPOs survive because of the talented individuals who volunteer as leaders of these organizations; however, it is how these leaders systematically use and improve their processes in addition to leveraging their resources that makes a small NPO an irreplaceable asset for the community they serve.

### **Applying For-Profit Approach to Nonprofit Organizations**

Coupling the Dynamic-Capabilities Framework and Resource-Based View have offered a unique perspective when working with small nonprofit leadership. While the DCF framework alone could have created a clear picture of needs regarding GAGC's system of responding to challenges through organizational processes, the addition of RBV has pushed this organization to think about how to leverage their resources alongside processes, a critical step when building capacity



throughout the state of Georgia. Leaders of small NPOs who are looking to grow their impact should consider this series of analysis procedures to explore their current processes and identify places for improvement. Additionally, if leaders of NPOs are exploring ways in which they can learn to increase the collective engagement of their often volunteer workforce to achieve a shared vision, we recommend considering the application of the Dynamic-Capabilities Framework and Resource-Based View for the task.



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## XIII. Appendices

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## **Appendix A: GAGC Bylaws, Duties of Officers** (GAGC Website)

### **Section 3: Duties of Officers**

#### **A. The President shall ...**

1. preside at all regular meetings of the Corporation
2. call special meetings of the Corporation or any of its committees
3. establish necessary ad hoc committees
4. present standing committee chair appointments to the Executive Board for majority approval
5. define the duties of committee whenever such duties may not have been adequately defined by the Corporation or the Bylaws
6. coordinate activities of the standing committees of the Corporation
7. determine and present a Presidential Initiative that represents a passion area or relevant
8. focus tied to GAGC's vision, mission, and current strategic plan that will be an emphasis for the organization during the two year term of presidency
9. promote the best interest of the Corporation in all possible ways
10. require all officers and committee chairs to submit written reports due at times designated by the President

#### **B. The President-Elect shall ...**

1. 1. automatically be vested with the powers of the President when, for any reason, the President becomes unable to attend to his/her Presidential duties (See Section 4 of this Article)
2. perform other duties at the direction and discretion of the President not otherwise assigned by the Bylaws
3. chair the nominating committee for the election of the Executive Board
4. provide general supervision of personnel operations in the areas of policy revision, salary and fringe benefits administration, recruitment and retention, and employee relations.
5. conduct annual review of all paid personnel of the Corporation.

#### **C. The Secretary shall ...**

1. record and file the minutes of the Corporation
2. distribute minutes of all Executive Board and Executive Council meetings to members of each group within two weeks following the meetings
3. receive and file copies of the minutes of committee meetings and reports from the Executive Board members, committee chairs, and liaison/representatives
4. monitor and oversee the Corporation's social media, print, and electronic media.

#### **D. The Treasurer shall ...**

1. be entrusted with the collection and safekeeping of all funds of the Corporation
2. be the person authorized to draw money from the Corporation funds and make payment Corporation debts
3. monitor membership dues
4. present a financial statement at each meeting of the Executive Board



5. handle annual updates of information regarding status of the Corporation and file appropriate financial records with state and federal agencies.
6. Co-serve with the newly elected treasurer through the end of that fiscal year

**E. The Convention Co-Chairs shall...**

1. chair the Convention Committee
2. post pertinent convention information to the Corporation's social media
3. perform other duties at the direction and discretion of the President not otherwise assigned by the By-Laws.

**F. The Legislative Liaison shall . . .**

1. assume the responsibility of being informed of current state and national issues affecting gifted education and communicated such to the Executive Board and membership as deemed appropriate by the Executive Council
2. make contact with appropriate persons regarding legislation affecting gifted education
3. file a written report to the Executive Board
4. post pertinent legislative information to the Corporation's social media
5. be responsible for activities related to Gifted Education Month in Georgia.

**Section 4**

**Term of Office and Succession to Offices**

- A. The term of each office shall be two years.
- B. Ordinarily, the President-Elect will become President after completing a two year term as President-Elect. In the event of the office of the President is vacated for any reason, the President-Elect will serve as Acting President for the remainder of the term. Then, the person shall serve the term for which (s)he was elected.
- C. The President and President-Elect shall not succeed themselves.
- D. Should an office, other than President, be vacated, that position shall be filled by a presidential appointment with Executive Board approval for the unexpired portion of the term.
- E. The Legislative Liaison, Secretary, and Convention Co-Chairs may serve no more than two consecutive terms unless deemed otherwise by the Executive Board.



## **Appendix B: Cognitive Interview and Scaled Questionnaire of Seven First-Order Factors for Dynamic Capabilities**

Adapted from MacImerney-May (2011) for Georgia Association for Gifted Children

**Cognitive Interview Protocol: The president and president-elect will participate in cognitive interviews of the following survey. We will record these virtual sessions.**

1. Explain the purpose of the interview.

*Thank you for taking the time to meet with me today. As you may know, we are interested in understanding more about GAGC from a leadership perspective and the dynamic capabilities of the organization. Understanding the organization's ability to sense, learn, and reconfigure is a critical part of our work, as we need to understand how GAGC currently operates what you have available and what is missing from GAGC as we make recommendations for improvement.*

2. Consent Process: Please be sure to consent the participant if s/he has not consented before (see Interview Process document). In all cases, tell the participant:

*Before we begin the focus group, I want to remind you that participating in this study is voluntary and your responses are completely confidential. At any point during the focus group, if you would like me to turn off the recording, just tell me to do so. Do you have any questions about the study before we begin?*

---

### **Warm-up**

*Before we begin the actual interview, I'd like to ask you a 'warm-up' question to introduce you to the think aloud process. In thinking aloud, please know there are no wrong answers. I am only interested in knowing what is going through your mind. Any information you provide during this warm-up will not be used in our analysis; this session is merely to help us both become familiar and comfortable with the 'think aloud' process.*

*Try to visualize a place where you've lived. It could be your current home or a place you've lived in the past. As you think about that place, think about how many windows there are in that place or in part of that place if it's very large. As you move through the place and count the windows, tell me what you are seeing and thinking about.*

- Give positive feedback for what the interviewee did well. For example: *The way you described the details of your thoughts was really great. That's exactly the level of detail that I'll be asking you to 'think aloud' in the activity today.*



- If the interviewee struggled with this warm up, demonstrate with your own response to the above prompt, modeling “thinking aloud” with rich details.

---

**Introduction:**

*Thank you for participating in this cognitive interview. Your participation will help us to determine if there are any last minute adjustments that need to be made before the questionnaire is sent to all GAGC leaders. The purpose of this interview is to give us insight about how you rationalize the scoring process of each statement. Take as much time as you need to look over each statement. As you look over each statement, I will ask you some questions about what you are thinking. I will be taking a few notes and recording our Zoom session. This will help me remember what you said.*

*Please comment aloud as you go through each statement. There are no wrong things to say. I am interested in hearing all your thoughts and reactions. If you have questions that you would like to ask about the statements, I'll ask you to hold them till the end of our interview time; as we want to ensure that we use this time to track your scoring process. Do you have any questions about the interview process before we get started? We will now get started with the cognitive interview."*

*I am now going to read statements to you about GAGC.*

**Turn the recorder on:**

*This is focus group title. It is (date) at (time). This is (interviewer's name) and I am interviewing (number of participants) from GAGC's Executive Leadership team.*

**\*Begin reading each statement from the survey, allowing for the participant to rationalize the statement and their scoring process via the seven point scale.**

---

**Scaled Questionnaire Protocol: The following information will be supplied to all leadership members as they complete the survey electronically.**

**Introductory Message:** *Welcome to the Georgia Association of Gifted Children Leadership Questionnaire. This questionnaire is helping us understand how to support you, as a member of GAGC, collect and disseminate information. At any point that you read the term “organization” that is in reference to the Georgia Association of Gifted Children.*

*This questionnaire will take approximately 45 minutes to complete. For each of the following questions, unless otherwise directed, please mark the one answer that best describes your experiences as a teacher/administrator during the current and previous school year. Please use the scale provided for your response; however if you do not know to what extent you agree with the item, please use the option “I do not know.”*



I do not know

1

2

3

4

5

6

7

**Strongly Disagree**

**Strongly Agree**

### Item Question in Scaled Questionnaire

<b>Opportunity Recognition Framework Step 1</b>	1	This organization is slow to detect fundamental shifts in Georgia education.
	2	This organization periodically reviews the likely effect of changes in Georgia education as it connects to teachers of Gifted students.
	3	This organization quickly understands new opportunities to serve their members.
	4	This organization is very good at observing and anticipating technological trends in Georgia education.
<b>Monitoring Framework Step 2 &amp; 7</b>	5	This organization regularly checks the quality of their ability to function in comparison to other gifted organizations.
	6	This organization regularly checks the quality of their ability to function in comparison with other non-profit educational organizations.
	7	This organization pays great attention to monitoring the change of their abilities to function.
	8	After changing existing capabilities or integrating new capabilities, this organization pays great attention to monitoring the efficiency of new processes.
<b>Knowledge Creation &amp; Acquisition Framework Step 3</b>	9	The organization's members have the capabilities to produce many novel and useful ideas.
	10	Within this organization, members have the capabilities to successfully learn new things.
	11	Members have the capability to effectively develop new knowledge or insights that have the potential to influence Gifted education in Georgia.
	12	When solving problems, members can rely on strong regional support.
	13	The organization frequently acquires knowledge about technologies and education trends from outside the organization.
	14	This organization is able to identify and acquire external knowledge (e.g. evidence-based practice, pedagogy, technology) very quickly.





	15	Members of the organization regularly visit other Georgia schools to learn about new technologies, trends, or teaching models.
Knowledge Sharing Framework Step 4	16	Existing knowledge (e.g. education or technology) is readily available to each member within the organization.
	17	This organization periodically circulates codified knowledge in form of documents (e.g. reports, newsletters) to update their members.
	18	When something important happens (education, legislative, or technological development), the whole organization knows about it in a short period.
Capability Creation Framework Step 5	19	This organization is effective at transforming existing knowledge into new resources (e.g. new pedagogy/learning strategies, new professional development, new technical equipment).
	20	The organization's members introduce innovative changes that lie outside the current opportunities and abilities of the organization.
	21	The organization's members are able to identify valuable organizational components, connect, and combine them in new ways.
	22	This organization can effectively recombine current abilities and strategies into innovative combinations.
Capability Integration Framework Step 6	23	The organization's members integrate new and existing ways of doing things without stifling your primary role inside your school district.
	24	This organization can effectively integrate new externally sourced strategies and combine them with current strategies into innovative combinations.
	25	This organization can successfully integrate the new knowledge acquired with their existing knowledge.



## Appendix C: VRIO Focus Groups and Forms

Adapted from Ariuani, W., Daryanto, A., Sahara, (2018)

**Cycle of VRIO Process:** This cycle will be produced to generate results in the VRIO process. To see the details of each step, please view the following pages in Appendix B.

Step	Data Collection Process	Session/Form Description
Step 1	Session 1 Focus Group	Listing of all resources that connect to VIRO
Step 2	Form 1	Individually evaluating the VRI nature of each resource from Session 1
Step 3	Session 2 Focus Group	Consensus regarding Form 1
Step 4	Form 2	Individually evaluating the organization efficiency of GAGC at capitalizing their VRI resources from Session 2
Step 5	Session 3 Focus Group	Consensus regarding Form 2

**Informed Consent process to be completed before turning on the recording for every virtual meeting (Session 1, Session 2, and Session 3):**

1. Explain the purpose of the focus group.

*Thank you for taking the time to meet with me today. As you may know, we are interested in understanding more about GAGC from a leadership perspective and what resources and capabilities the organization currently utilizes. Resources are a critical part of our work, as we need to understand what you have available and what is missing from GAGC as we make recommendations for improvement.*

*I am going to be asking you questions about GAGC's resources, their value, and how unique these resources are to the organization. When discussing resources, we are not only focused on things that connect to money and financial power. We are thinking more about how you all, as members of the organization, contribute due to your expertise and ability to support the larger organization. So, as we continue this discussion, please consider yourselves as resources too.*

2. Consent Process: Please be sure to consent the participant if s/he has not consented before (see Interview Process document). In all cases, tell the participant:

*Before we begin the focus group, I want to remind you that participating in this study is voluntary and your responses are completely confidential. At any point during the focus group, if you would like me*



*to turn off the recording, just tell me to do so. Do you have any questions about the study before we begin?*

**Turn the recorder on:**

*This is focus group title. It is (date) at (time). This is (interviewer's name) and I am interviewing (number of participants) from GAGC's Executive Leadership team.*

---

**Session 1: Initial Focus group with Executive Leadership Team**

**\*Before starting: Complete Informed Consent Process**

**Introductory Questions:** Provide opportunities for all participants of the focus group to answer these questions before proceeding to Question 1.

*Before we begin, I need to collect some routine information from each of you. Please answer the following questions when it is your turn.*

- *What is your name?*
- *What is your role in GAGC?*
- *What is your role in Georgia Education?*
- *How long have you been in the education field?*
- *How long have you been a certified gifted educator?*

**Questions:**

*The following questions consider the types of resources you already have available as an organization. To clarify, when speaking of resources, we are not only thinking about fiscal and tangible resources. We want to consider the human resources that you already have as it relates to your attempts to support the Georgia Gifted community. Any questions?*

1. *Our first goal is to list all the resources you have regarding the specialized know-how of Gifted Education in the state of Georgia. By specialized know how, we mean:*
  - a. *What sets you apart in terms of your knowledge regarding Georgia's gifted education community compared to other organizations?*
  - b. *For example: Are there types of training that you all host that no one else can effectively provide?*
  - c. *What other resources do you have based on your collective knowledge/experience?*
2. *Our next goal is to list all the resources you have in regards to your reputation as connected to Gifted Education. By reputation, we mean:*
  - a. *What acts as an indicator of your reputation regarding Georgia's gifted education community?*
  - b. *For example: Have you all won awards that set you apart from other organizations?*
  - c. *How are you distinguished from other groups in the state of Georgia?*



3. Finally, we want to work on listing all the resources you have in regards to cooperative alliances in Gifted Education. By cooperative alliances we mean:
  - a. What other groups do you work with routinely that help make an impact on Georgia's Gifted education?
  - b. For example: How are you involved with the Department of Education? What about individual counties? How about RESA?
  - c. If you were attempting to label your entire larger network of organizations, which ones would you include?

**End of Session:** Thank you for your time in building this preliminary list. To continue this study, we will be sending each of you a form that allows you to rate each resource based on its value, rarity, and inimitability. We would like to take just a moment to define these for you now and answer any questions you may have. \*Display scales and answer questions regarding each term. Pause for questions after discussion of each scale.

- **Value: How important is this resource to GAGC?**

1	2	3	4
Not important at at all to GAGC	Somewhat important to GAGC	Important to GAGC	Critical to GAGC

- **Rare: How frequently is this type of resource used by other organizations? Is GAGC the only organization with this resource?**

1	2	3	4
Always used by other organizations	Routinely used by other organizations	Sometimes used by other organizations	Never used by other organizations

- **Inimitable: How easily can this resource be duplicated or is it unique to GAGC?**

1	2	3	4
Easily duplicated	Somewhat able to duplicate	Able to duplicate	Highly difficult to duplicate

---

### Form 1: Value, Rarity, and Inimitable

**Instructions:** Based on the following criteria, how would you rate each resource in terms of value, rarity, and inimitability (uniqueness)? Please use the following scale to make your decision for each criteria.

1. **Value: How important is this resource to GAGC?**



1	2	3	4
Not important at all to GAGC	Somewhat important to GAGC	Important to GAGC	Critical to GAGC

**2. Rare: How frequently is this type of resource used by other organizations? Is GAGC the only organization with this resource?**

1	2	3	4
Always used by other organizations	Routinely used by other organizations	Sometimes used by other organizations	Never used by other organizations

**3. Inimitable: How easily can this resource be duplicated or is it unique to GAGC?**

1	2	3	4
Easily duplicated	Somewhat able to duplicate	Able to duplicate	Highly difficult to duplicate

---

**Session 2: Second group with Executive Leadership team**

**Before Session: Use results of Form 1 to do the following:**

1. Understand collective perspective of each resource based on scaled response
2. Categorize VRI based on Figure 4 from proposal
3. Ordinarily organize resources based on high to low rating per category, filtering based on criteria from Figure 4
4. Identify strength or weakness label

**\*Before starting: Complete Informed Consent Process**

**Instructions:** Review results of Form 1 with Leadership. Clarify which resources are considered strengths and weaknesses. Ask for feedback from the leadership team.

*The following chart establishes the results from the form that you all scored regarding the value, rarity, and inimitability of each GAGC resource. We want to take the time to review these results and make sure that consensus is reached throughout the leadership team. Any questions?*



**Example:** *X resource was described as (valuable, rare, inimitable) by the leadership team. This means that the resource is considered a (strength/weakness) to the team. What feedback do you all have regarding this result from your individual scoring?*

Resource/Capability	V	R	I	Strength or Weakness (Completed by researchers based on procedure established in Figure 8)
<b>Specialized Know How</b>				
<b>Reputation</b>				
<b>Cooperative Alliances</b>				

**End of Session:** *Thank you for another fantastic focus group. Our final form for this part of the research process will ask for you to rate GAGC's efficiency in capitalizing their use of resources that you all have found to be valuable, rare, and inimitable. We are trying to decipher which resources are used effectively and which ones will need to be reconsidered when pushing forward in this process. We will send a rubric-style form for each resource, but if you have questions about this rubric, do not hesitate to reach out. Thank you*

## Form 2: Organization Likert Scale

**Communication before form distribution:** Researchers Galindo and Lott will work together to build a rubric to describe each resource on a scale of 1-4 (minimal to high efficiency and minimal to high impact). They will use this rubric to add context to each resource to mitigate confusion of participants as to the ordinal nature of each potential response. As these resources have yet to be identified by GAGC leadership, the rubric cannot be submitted at this time.

**Instructions:** Consider how effectively GAGC uses the following resources. Please use the following rubrics to make your decision on effectiveness per resource listed.

How efficient is GAGC at using this resource?	Efficiency Scale			
	Minimal	Some	Average	High
	1	2	3	4



What impact does this resource have based on the efficiency of GAGC?	Impact Scale			
	Impacts 0-25% of the organization	Impacts 26-50% of the organization	Impacts 51-75% of the organization	Impacts 76-100% of the organization
	1	2	3	4

### Session 3: Final focus group with Executive Leadership Team

#### Before Session: Use results of Form 2 to do the following:

1. Understand collective perspective of each resource based on efficiency scaled response
2. Categorize resources based on efficiency by indicating frequency of scale
3. Organization Level of Capability: Percentages derived from points possible to points earned on the efficiency scale.  $(n_1 * ES_{selected_1} + n_2 * ES_{selected_2} \dots / n * 4)$
4. Implication marker gathered from results of Form 1/Session 2

#### \*Before starting: Complete Informed Consent Process

**Instructions:** Review results of Form 2 with Leadership. Clarify results of scale and percentages. Ask for feedback from the leadership team.

*The following chart establishes the results from the form that you all scored regarding the organizational efficiency of each GAGC resource. We want to take the time to review these results and make sure that consensus is reached throughout the leadership team. Any questions?*

**Example:** *X resource was described as (efficiency score & impact score) by the leadership team. This means that the resource is considered (descriptor) to the team. What feedback do you all have regarding this result from your individual scoring?*

**End of Session:** *Thank you for participating in this multistep process towards understanding what resources you have available at GAGC. Please remember that all member responses involved in this process are kept confidential. If we have questions after analysis of this session, we may reach out to you individually for clarification. Thank you for your time.*



## Appendix D: Member-Wide Survey for Gifted Teachers and Administrators

Adapted from EdWeek Research Center's National Survey (2019)

**Introductory Message:** *Welcome to the Georgia Association of Gifted Children State-Wide Survey. This survey will take approximately 40 minutes to complete. For each of the following questions, unless otherwise directed, please mark the one answer that best describes your experiences as a teacher during the current and previous school year. Please answer every question unless directed otherwise.*

### Demographic Questions:

- 1. What is your role in the Georgia Association for Gifted Children?**
  - a. Executive Leadership
  - b. Regional Representative
  - c. Member
  - d. I am not currently a member of GAGC
- 2. What is your role in Georgia Gifted Education?**
  - a. State-level leadership
  - b. District/System-Level Leadership
  - c. School-Level Leader
  - d. Teacher
  - e. Support Personnel
- 3. How long have you been in the education field?**
  - a. 0-5
  - b. 6-10
  - c. 11-15
  - d. 16-20
  - e. 20+
- 4. How long have you been a certified gifted educator?**
  - a. 0-5
  - b. 6-10
  - c. 11-15
  - d. 16-20
  - e. 20+
- 5. What RESA Region does your school belong to? (Please reference the map if you are not sure.)**
  - a. Drop down of Regions 1-16
  - b. Map provided will be identical to **Figure 1** of proposal
- 6. Check all that best describe your school/district student population:**
  - a. More than 50% of one ethnic group
  - b. No more than 50% of one ethnic group
  - c. More than 50% low socioeconomic status





- d. Less than 50% low socioeconomic status
- e. Rural
- f. Suburban
- g. Urban

---

Please complete the following open-ended questions in as much detail as possible.

- 7. What resources and/or professional learning do you need to support gifted education in your classroom? In your district?
- 8. What challenges do you experience in delivering education to gifted students in your classroom? In your district?
- 9. In what ways does GAGC currently support you as a gifted educator?
- 10. In what ways could GAGC improve to support you as a gifted educator?

---

11. Does your district have a definition of gifted/talented? Select all that apply.

- a. Yes, in district policy
- b. Yes, in state rules and regulations
- c. Yes, in state statute
- d. Yes, in other
- e. No definition
- f. I don't know

12. Which of these factors is addressed in your district's definition of gifted/talented?

Select all that apply.

- a. Intellectually gifted
- b. Academically gifted
- c. Creatively/artistically gifted
- d. Specific academic areas
- e. Gifted with a disability
- f. Highly or profoundly gifted
- g. Culturally/ethnically diverse
- h. Leadership
- i. ESL/ELL
- j. Low Socioeconomic Status
- k. Underachieving
- l. Athletically gifted
- m. Geographically isolated/rural
- n. I don't know



**13. In the past year, what percentage of your district's schools identified at least one gifted/talented student?**

- a. More than 75%
- b. 51-75%
- c. 26-50%
- d. 25% or less
- e. I don't know

**14. What are some common reasons why students who are identified as gifted in your district do not end up receiving gifted services?**

- a. Students/parents opt out of programs
- b. Lack of resources, such as funding or staff
- c. Students do not meet behavioral or performance standards
- d. Students have scheduling conflicts or choose to participate in other classes, programs
- e. Other
- f. None of the above

**15. Under which departments/divisions does your district include gifted/talented education? Select all that apply.**

- a. Gifted and Talented, separate from special or general education
- b. Special Education
- c. Curriculum and Instruction
- d. General Education
- e. Exceptional Students
- f. Other

**16. Are schools required to use specific criteria/methods for identification of gifted students? Select all that apply.**

- a. Yes, determined at the local level
- b. Yes, determined at the state level
- c. No
- d. Other
- e. I don't know

**17. Which of the following indicators does your district use when identifying gifted students? Select all that apply.**

- a. Test scores other than IQ scores
- b. Nominations/referrals
- c. IQ scores
- d. Multiple criteria model
- e. Range of approved assessments
- f. Grades
- g. Other
- h. I don't know



**18. Which of the following assessments does your district use to identify gifted students?**

**Select all that apply.**

- a. CogAT
- b. Wescher Intelligence Scale for Children
- c. Naglieri Nonverbal Ability Test
- d. Woodcock Johnson
- e. ITBS
- f. Otis-Lennon
- g. Screening Assessment for Gifted Elementary Students
- h. Stanford Binet L-M
- i. Test of Nonverbal Intelligence
- j. District-created assessment
- k. ACT
- l. Ravens Progressive Matrix
- m. Test of Mathematical Abilities of Gifted Students
- n. SAT
- o. MAT
- p. SRA
- q. Hemmon-Nelson
- r. Other

**19. When there is a cost associated with screening students for gifted and talented education, how does your district pay for it?**

- a. The district always pays
- b. Sometimes parents pay, sometimes the district pays
- c. Parents always pay
- d. Other
- e. I don't know
- f. N/A-there is no cost associated with screening students for gifted and talented education

**20. In your school district, when are students identified for gifted services? Select all that apply.**

- a. Following teacher referral
- b. Following parent referral
- c. At multiple points in K-12
- d. When taking other assessments approved for GT identification
- e. Following student referral
- f. All students screened in elementary school (one time only)
- g. When students transfer from out of the district
- h. Kindergarten or early entrance screening
- i. Entering middle school
- j. Entering high school



- k. Other
- l. I don't know

**21. To what extent do you agree or disagree with the following statement? My district's procedure for screening gifted and talented students identifies all or almost all the students who should be in the program:**

- a. Completely agree
- b. Somewhat agree
- c. Somewhat disagree
- d. Completely disagree
- e. I don't know

**22. How would educators describe the representation of students of different races/ethnicities in gifted education in their districts?**

- a. Black
  - i. Over-represented in gifted ed
  - ii. Under-represented in gifted ed
  - iii. Neither over nor under-represented
  - iv. I don't know
- b. Hispanic
  - i. Over-represented in gifted ed
  - ii. Under-represented in gifted ed
  - iii. Neither over nor under-represented
  - iv. I don't know
- c. Native American
  - i. Over-represented in gifted ed
  - ii. Under-represented in gifted ed
  - iii. Neither over nor under-represented
  - iv. I don't know
- d. Asian
  - i. Over-represented in gifted ed
  - ii. Under-represented in gifted ed
  - iii. Neither over nor under-represented
  - iv. I don't know
- e. White
  - i. Over-represented in gifted ed
  - ii. Under-represented in gifted ed
  - iii. Neither over nor under-represented
  - iv. I don't know

**23. How would educators describe the representation of students of different socio-economic statuses in gifted education in their districts?**

- a. Students who live in poverty
  - i. Over-represented in gifted ed



- ii. Under-represented in gifted ed
  - iii. Neither over nor under-represented
  - iv. I don't know
- b. Students from high-income families
- i. Over-represented in gifted ed
  - ii. Under-represented in gifted ed
  - iii. Neither over nor under-represented
  - iv. I don't know

**24. How would educators describe the representation of students with Individualized Education Programs [IEPs] in gifted education in their districts?**

- a. Over-represented in gifted ed
- b. Under-represented in gifted ed
- c. Neither over nor under-represented
- d. I don't know

**25. How would educators describe the representation of English language learners in gifted education in their districts?**

- a. Over-represented in gifted ed
- b. Under-represented in gifted ed
- c. Neither over nor under-represented
- d. I don't know

**26. How would educators describe the representation of females in gifted education in their districts?**

- a. Over-represented in gifted ed
- b. Under-represented in gifted ed
- c. Neither over nor under-represented
- d. I don't know

**27. How much of an effort has your district made in the last five years to increase the odds that groups of students that are currently underrepresented in gifted education will be screened/identified as gifted?**

- a. Big effort
- b. Medium effort
- c. Small effort
- d. No effort

**28. What steps has your district taken to increase the odds that groups of students that are currently under-represented in gifted education will be screened/identified as gifted?**

- a. Adopting new or additional assessments to screen/ identify students
- b. Screening all students
- c. Taking multiple criteria into consideration
- d. Targeting disadvantaged populations for screening/identification
- e. Training teachers and staff
- f. Encouraging screening referrals from parents and teachers



- g. Offering enrichment programs and support for high-potential students not qualifying for gifted services
- h. Other
- i. I do not know

**29. Why do you think that your district has not made an effort in the past five years to increase the odds that groups of students that are currently under-represented in gifted education will be screened/identified as gifted?**

- a. Not considered a priority by school/district leaders
- b. Gifted program already representative of student population
- c. Inadequate funding
- d. Understaffed
- e. Insufficient staff knowledge
- f. Lack of time
- g. Lack of pressure from parents/community for screening/identification changes
- h. Other
- i. I do not know

**30. In what grades do gifted/talented students receive specialized services in your district?**

**Select all that apply**

- a. K
- b. 1
- c. 2
- d. 3
- e. 4
- f. 5
- g. 6
- h. 7
- i. 8
- j. 9
- k. 10
- l. 11
- m. 12
- n. I don't know

**31. How do gifted/talented students receive services in your district? Select all that apply.**

- a. Pull-out program
- b. Honors/advanced coursework
- c. In the regular classroom
- d. Dual enrollment
- e. Cluster classrooms
- f. Self-contained classrooms
- g. Magnet schools or other selective or application-based schools
- h. AVID



- i. Specialized high schools
- j. Other
- k. None of the above
- l. I don't know

**32. In your school district, which gifted education services are available? Select all that apply.**

- a. Content enrichment
- b. Content acceleration
- c. Contests and tournaments
- d. Thinking skills instruction
- e. Independent study
- f. Socio-emotional supports
- g. Support for college transition
- h. Mentoring
- i. Summer or weekend enrichment
- j. Support for disadvantaged populations
- k. Other
- l. None of the above
- m. I don't know

**33. Are teachers in gifted/talented programs in your district required to have a credential/degree in gifted/talented education?**

- a. Yes, by state laws, rules, and/or regulations
- b. Yes, by district policy
- c. Yes, but I'm not sure who requires it-the district or the state
- d. No
- e. I don't know

**34. Do general education teachers in your district receive professional development on the needs of gifted/talented students?**

- a. Yes, required by state law or policy
- b. Yes, required by the district
- c. Yes, on a voluntary basis
- d. Yes, but I'm not sure if it's required or who requires it
- e. No, not required
- f. I don't know

**35. Who delivers most of the gifted education services to students in your school district? Select all that apply.**

- a. Teachers with special training in gifted education
- b. General education teachers
- c. Other staff, such as educational assistants
- d. Other
- e. I don't know



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