



# Making the Invisible Visible: An Examination of the Role of ECW's Executive Director in Goal Attainment

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# Acknowledgement and Dedication

## Acknowledgement

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## Executive Summary

An increase in the number of women in the workforce has had profound effects on our world, including a rising Gross Domestic Product (GDP), heightened levels of workforce productivity, and a reduction in gender barriers that once painted women solely as caregivers. Organizations like East Coast Women (ECW), a global nonprofit with over 100 affiliates in countries world-wide, are committed to helping women achieve their goals regardless of their life circumstances.

The focus of this capstone is one chapter of the ECW organization headquartered in a large metropolitan city on the east coast. For the purposes of this study, the chapter chose to remain anonymous. The problem of practice that this capstone addresses is how this chapter of ECW can attain its goal of reaching as many clients as possible through program expansion. The team primarily used the Nonprofit Organizational Model (Thompson, 2011) to observe the challenges occurring within ECW. More specifically, our data analysis and the development of our recommendations were guided by the model's primary elements of Leadership, Mission, and Infrastructure. Armed with the purpose of uncovering why ECW fails to achieve its goals, we developed the following research question: *What factors are impeding goal attainment at ECW?* To help sustain a connection with the literature throughout the study, we also formulated the following sub-questions tied to the Nonprofit Organization Model framework.

1. **Leadership:** How is the Executive Director (ED) supporting organizational goal attainment?
2. **Mission:** How are goals communicated to and understood by the chapter?
3. **Infrastructure:** In what ways is ECW structured to support goal attainment?



By collecting and analyzing primary and secondary sources, including interviews and historical documentation, the team utilized a thematic approach through the development of codes that helped uncover meaning and, ultimately, lend greater insight into some of the factors that were holding the organization back from success. The findings of a comprehensive review of the data include:

- Many feel important ED roles are not being filled.
- The ED does not have clearly defined roles and responsibilities.
- An absence of goals has led to a lack of accountability.

The team developed the following recommendations based on our findings and best practices surrounding goal setting, leadership, and organizational structure:

- Identify and effectively communicate ECW organizational goals.
- Develop and implement performance metrics to measure ECW's goal attainment.
- Strengthen the leadership of the ECW ED by creating a performance evaluation and conducting a performance evaluation each year.
- Improve ECW's organizational structure by creating and sharing a comprehensive job description for the ED.

Though the data from the primary and secondary sources aligned, instilling confidence in our findings, there were still some limitations present in this study. These limitations included:

- A small, pre-selected sample size.
- Our team was limited to only interviewing leadership members.
- Our team was limited geographically due to COVID-19 restrictions.

Despite these limitations, we were still able to complete the interviews as scheduled and the organization did supply us with ample internal documents for analysis.



Goal attainment in nonprofits is often difficult to quantify because unlike for-profit companies, success may not be measured by financial gains. Based on a review of the literature and our findings, our team ultimately recommended that ECW take ownership of their goals to determine not only how they will measure the achievement of those goals, but also who will be responsible for each aspect of goal achievement.

## Introduction

The demand for nonprofit organizations (NPO) continues to strengthen as social issues and needs have grown. For NPOs, goal setting is rarely rooted in financial gain, as their name would imply, but rather in achieving the social goals set forth by the organization's mission (Ortega-Rodriguez, Liceran-Gutierrez, & Moreno-Albarracin, 2020). However, for a nonprofit to perform well, it must demonstrate financial competence to donors, grantors, and philanthropists. This entails developing measurable goals and a commitment to accountability and transparency that builds confidence in potential donors and is communicated throughout the organization.

NPOs that offer transparency in disclosing information about their organization demonstrate that the organization has the necessary infrastructure, leadership, and practices to achieve its stated goals (Ortega-Rodriguez, Liceran-Gutierrez, & Moreno-Albarracin, 2020). Transparency and accountability, in effect, can impact the perception of the organization's legitimacy, fundraising potential, and capacity to implement systems that are necessary for achieving the organization's goals. To accomplish transparency, NPOs must continuously review both processes and outcomes to assess how effectively it is meeting its mission and financial needs. Organizations should regularly examine what



resources are needed and utilized, how leadership affects goal attainment and resource stewardship, and what infrastructure is in place to ensure goal achievement.

One organization that is struggling to achieve the kind of transparency and goal setting important to an NPO's success is East Coast Women (ECW), a global nonprofit and the focus of this study. Upon our introduction to this organization and its vital mission of supporting women to achieve their goals, leadership voiced concerns that ECW fell short in fulfilling its stated goal of empowering women. Although each of them believed deeply in the services provided by the organization, there was confusion and disagreement around the crux of the organization's problems. After learning more, our research team and the leadership at ECW decided to partner to investigate why a group of dedicated women with such a powerful mission was falling short of accomplishing their goals.

To investigate this question, our research team conducted interviews and data analysis to explore what structures, supports, and programs were in place to achieve ECW's goals. Our findings formed the basis of 4 key recommendations to improve internal processes and help ECW reach its goal of increasing the organization's impact on women in its community.

## Organization Context

The organization that is the focus of this study is an affiliate of a globally based, nonprofit organization, with a mission of empowering women by offering a variety of services to encourage independence. It is located in a large metropolitan area on the East Coast of the United States. To respect the organization's request for anonymity in the publication of this research study, identifying information was removed and the organization will be identified throughout the study as "East Coast Women" (ECW) or



simply, “the organization.” The names and titles of those who participated in this study have been withheld or altered in line with the organization’s request. Furthermore, a description of the organization is written to remove identifying factors to comply with the nondisclosure agreement.

### *ECW’s Role as an Affiliate*

ECW acts as an affiliate, or chapter, of a larger global parent organization. The global organization has been in operation for over twenty years in 150 cities worldwide.

Collectively, the affiliates of this organization have assisted 1.2 million women with their programs. ECW operates with the same published mission and vision statements as its parent organization and has been in operation since 2002.

**“ECW helps to send a message to our communities that. women are strong.”**

ECW leadership has stated that the goal for their affiliate is to expand its reach within the community through increased clientele numbers and programs. Currently, the organization has relationships with 32 referral agencies to gain access to prospective clientele. It is also exploring opportunities for expanding services.

### *Leadership and Volunteer Structure and Roles*

As a nonprofit organization, ECW relies heavily upon a core number of dedicated volunteers to accomplish its goals. The organization has two part-time paid staff members—the Executive Director (ED) and the Director of clientele programming—with the remainder of the leadership roles (board members and program managers) working as unpaid volunteers. Per the initially supplied internal documentation from ECW to our research team, individuals in leadership roles do not appear to have access to the same training materials nor professional development as the non-leadership volunteers.



Non-leadership volunteers must participate in a volunteer orientation to become active ECW volunteers. In this orientation, the volunteers are given information about the services provided by the organization. These areas of service include client preparation services (initial client intake data collection and orientation of clients), clientele mentoring, public speaking opportunities at ECW events, program consulting, fundraising planning, event management, and organization inventory management. Upon completion of this orientation, volunteers are asked to decide which area of service they are interested in volunteering for and to commit to working a minimum of 4 hours per week. In 2020, the organization reported having 100 active volunteers. This large base of volunteers has allowed the organization to continue to expand the kind of programming offered over time, resulting in additional roles and responsibilities in each department.

As ECW has grown, leadership has built the roles and responsibilities of new positions within their organization around the interests of specific people, instead of building them around the needs of the organization. For example, while the organization offers programming in areas that are required by the national office to maintain its affiliate status, volunteers can also submit proposals for new program areas. Once approved, the volunteer proposing the new program then transitions to a leadership volunteer role to head the development and operation of that department, even if the program area is very niche. Among these volunteer department heads, the leadership team acknowledges that turnover does occur in some departments more often than others, resulting in certain responsibilities going unfulfilled or adjusted depending on who is available to move into the role next. This can lead to a disruption of services if there is a delay in finding a new volunteer to step into the vacant role.



## *ECW Leadership*

ECW has a working board of directors. There are 12 members, all of whom are currently leaders in their industries, maintaining full-time jobs in addition to performing their board responsibilities. The demographics of the board are as follows:

- 83% of board members are African American; 17% Caucasian
- 92% are female; 8% male
- 75% are older than 45; 25% are younger than 45
- Professions represented on the board include attorneys, corporate executives, entrepreneurs, and communication professionals

As stated in the organization's yearly reports, there are currently no former or current clients of the organization serving on the board. Additionally, there are no representatives from the referral agencies who partner with ECW on the board. The composition of the board will shift in the 2020 reporting year, as the departure of at least three board members is expected for various reasons, including the addition of new corporate sponsorships.

To join the board as a member, there is a required buy-in, listed as a give/get policy. The required buy-in is set at \$5,500 per member. ECW's 2019 survey stated that 75% of board members donated or raised \$10,000, exceeding the set requirement. In some cases, corporations paid the buy-in for their representative to become a board member. As stated previously, new corporate memberships have recently been acquired. These memberships often include board seats for corporations who desire representation and can meet the financial obligations for those seats.

In addition to the monetary buy-in requirement, ECW requires a time commitment. Board members are required to attend all board meetings and major organizational events



such as galas, fundraising events, and donor luncheons. These types of large-scale events are conducted once per quarter (pre-COVID-19). The board also meets monthly to discuss organizational issues and the future direction of ECW. On average, board members can expect to participate in a minimum of two hours of meetings per month, with three to four hours of additional event participation per quarter.

The program department managers have time commitments beyond that of board members. Program department managers are tasked with planning and attending events, overseeing the volunteers in their department, reporting progress to the ED, and holding office hours. These obligations can incur time commitments of 4 hours per week or more, dependent on department size and the number of events linked to that department. As one of two paid staff members, the ED must also commit to more hours than board members or non-leadership volunteers. While the ED position is listed as part-time, the ED is required to be on-site during the 15 hours a week that the ECW office is open. In addition to on-site hours, the ED attends all outreach and corporate membership building events and oversees the program department managers. These requirements for ECW leadership are in addition to their outside jobs. In fact, all leadership members (program department managers, the ED, and the board) reported working full-time jobs outside of ECW.

The high expectations for both board members and leadership roles have yielded excessive attrition rates over the last decade. The Volunteer Manager (VM) reported that the organization has replaced their ED roughly every 1.5 years for the last 10 years. In 2019, 3 department managers left the organization (approximately 30% of the acting managers). Additionally, by the end of the 2020 reporting year, the VM stated that three board members (25% of the board) are vacating their seats. While there is little turnover in the non-leadership volunteer staff, it appears leadership roles experience turnover frequently.

## Referral Clientele Demographics

ECW focuses its volunteer efforts on delivering services to low-income women in high-need areas, with many clients reporting a history of abuse or homelessness. To better understand the makeup of the organization's clientele, ECW provided the research team with demographic information disclosed by individuals who were referred to the organization during the 2019 service year. According to the information ECW collected, the majority of clients who responded identified in the 41-50-year-old age range (39%) and predominantly as Black/African American (78%). These women demonstrate the highest need for the services that ECW provides.

Ethnicity of Clients Served	Percentages
Asian	0%
Australian	0%
Black/African American	78%
Caucasian/White	8%
Hispanic/Latina	14%
Maori	0%
Native American/Alaskan	0%
Pacific Islander	0%

Age of Clients Served	Percentages
18-24	10%
25-30	21%
31-40	25%
41-50	39%
Over 50	5%

Figure 1: Ethnicity of Clients Served and Age of Client Served (East Coast Women)

Additional demographic information presented in Figure 2 demonstrates that a majority of ECW clients report a high school or above education, with 256 of those clients stating that they completed some college coursework. ECW clients are predominantly mothers, with 181 identifying as single mothers, and 207 stating that they have children under the age of 18. Furthermore, according to the ECW 2019 report and interviews with leadership and board members, a significant percentage of their clientele have a history of

domestic violence. Social program employees, shelters, and other nonprofit organizations are the primary sources for client referrals to ECW.

Additional Demographics		Client Level of Education	
Category	In Numbers	Category	In Numbers
Mothers	217	Less than High School/Secondary School	22
Average Number of Children	2	High School Diploma/GED	171
Single Status	181	Some College Completed	256
Married Status	38	College Degree	20
Client has children under the age of 18	207	Complete Advanced Degree	2
Persons with Declared Prison or Jail Time Served	32		
History of Domestic Violence (As victim)	108		

Figure 2: Additional Demographics and Client Level of Education, (East Coast Women)

#### Organization Location Demographics

ECW specializes in acquiring clients in their metropolitan city who are categorized as low-income individuals, individuals facing adversity, and those needing assistance in gaining skill sets that support economic freedom and independence. To better understand the organization’s current and future clientele without compromising the organization’s request for anonymity, our team analyzed demographic information from a comparable major metropolitan city on the East coast of the United States. The demographics of this city provide data comparable to the city that ECW is located in regarding levels of education, income levels, median age, sex, and ethnicity.

According to the census data of this comparable metropolitan city displayed in Figure 3, over 90% of the population has achieved a high school diploma or higher, with over 50% achieving a bachelor’s degree (*Census Topics*, 2020). The median age in the area is roughly 34 years old, indicating a large percentage of working-aged individuals. The data depicted in Figure 4 also shows that 53% of the population identifies as female (the focus of ECW’s services) and 44% of the population identifies as Black/African American. Figure 5

conveys that median income per capita is roughly \$60,000, an income level that is categorized as lower-class for a family of four, according to the Pew Research Center (Bennett, Fry, & Kochhar, 2020). These demographics are in line with the referral demographics provided by ECW in their 2019 report, as well as the clientele that ECW seeks to serve.

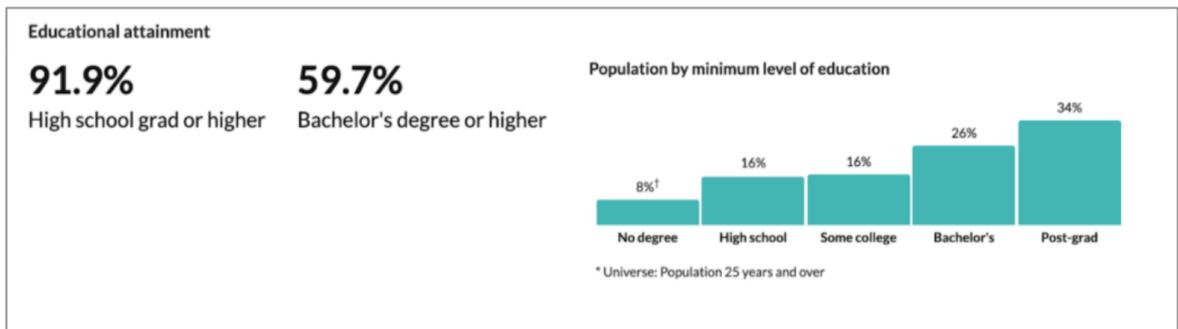


Figure 3: 2019 Educational Attainment Census Data (Census Topics)

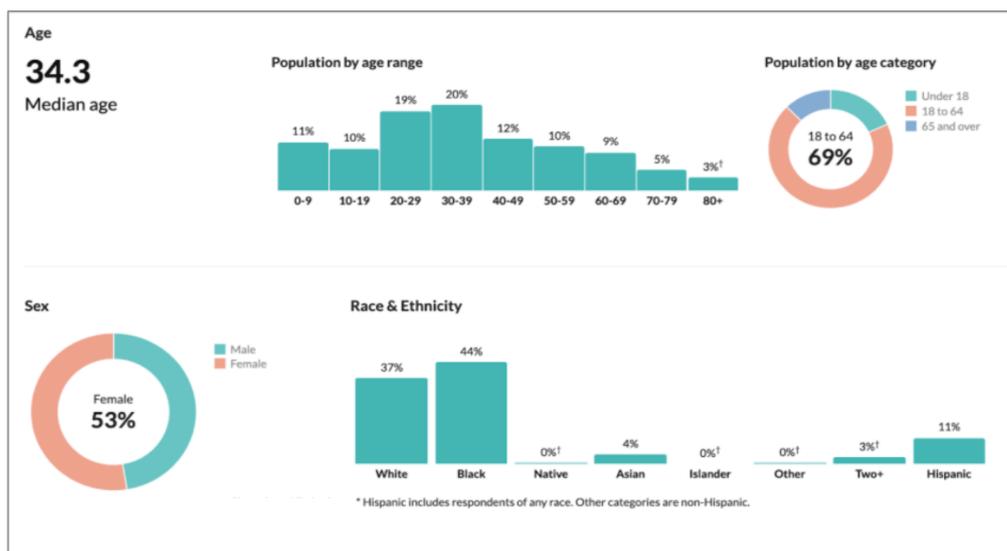


Figure 4: 2019 Age, Race, and Sex Census Data (Census Topics)

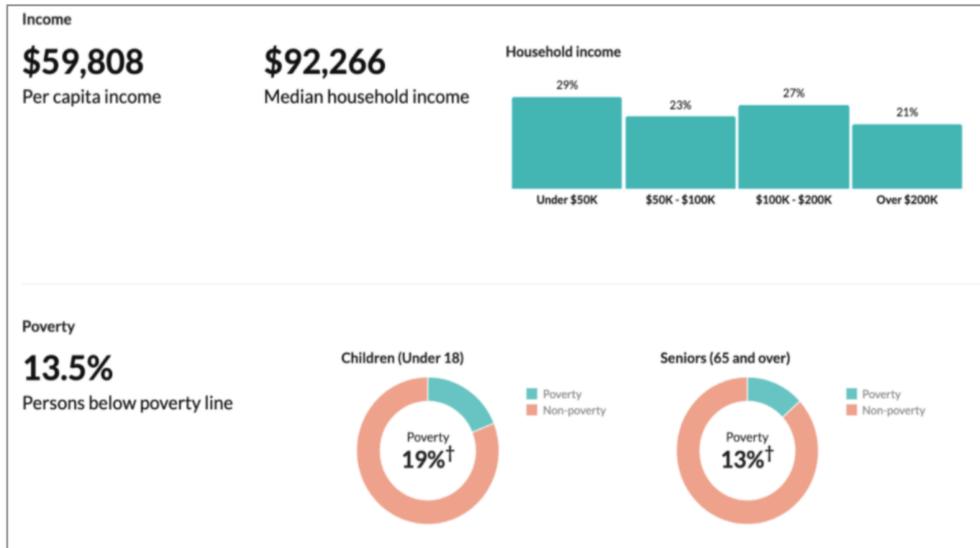


Figure 5: 2019 Economic Census Data, (Census Topics)

### Domestic Violence

As ECW works closely with women who identify as victims of domestic violence, the research team also examined national domestic violence rates to gain further insight into this population. According to the National Coalition against Domestic Violence’s (DV) 2020 report, *Domestic Violence*, 10 million adults in the U.S. experience DV each year, translating to approximately 1 in 4 women. DV is responsible for a loss of 8,000,000 days of paid work each year and between 21-60% of victims will lose their job as a result of experiencing DV (*Domestic Violence*, 2020). Specific to the African American community, the largest demographic of women helped by ECW, a disproportionate 45.1% of Black/African American women are victims of DV over their lifetime (*Domestic Violence and the Black Community*, 2020). What is more, victims of DV who leave their abuser often experience homelessness. According to a report from the National Resource Center on Domestic Violence, over 31,000 adults and children seek shelter assistance each day, with an additional 10,000 individuals being denied services because of a lack of funding, staffing, or



resources (*Domestic Violence and Homelessness, 2015*). Women who experience domestic violence and/or homelessness are prime candidates for ECW support.

### *Impact of COVID-19*

An additional complicating factor to recently emerge for this specific population of women is the impact of COVID-19. For the women of the large metropolitan area in which ECW operates, COVID-19 restrictions made it difficult to maintain financial stability through employment, as the uptick in unemployment claims shows. In fact, the Department of Labor reported that women experienced more job loss during the pandemic than men, with minorities applying for unemployment at a rate that was 13 times higher than pre-pandemic months (Taylor, 2020). Unemployment for workers between the ages of 25 and 34 went up 2% for a total recorded unemployment rate of 32%, while unemployment claims by workers between the ages of 55 and 64 increased by 6,900 claims, an increase of five-fold (Taylor, 2020).

Early data regarding the impact of COVID-19 on unemployment, domestic violence, and homelessness suggests that services, like those offered by ECW, were critical to vulnerable populations uniquely affected by COVID-19. Unfortunately, many organizations were unable to offer services during the city-wide shutdowns in 2020. ECW was forced to respond to the shutdowns no differently, ceasing all in-person operations and services in March 2020. Restrictions on in-person services remain in place at ECW for the safety and health of their volunteers and clients, according to the organization's website.

Ultimately, COVID-19 significantly impacted the organization's planning and programming abilities, making it challenging to fulfill ECW's stated goals for the 2020 reporting cycle. Despite their physical limitations, ECW leadership acknowledged that they are aware of the impact that the pandemic is having on their current and future clientele



and that they are dedicated to expanding their services post-pandemic, especially considering the potential for increased numbers of individuals in need of social services. ECW board leadership further expressed that they are invested in making the necessary changes to ensure that their operations are revamped in a manner that best serves their diverse clientele as soon as they are safely able.

## Problem of Practice

ECW's mission is to offer services that empower women to build the skills necessary to achieve greater independence. Though COVID-19 affected the organization's ability to carry out its mission in 2020, ECW reported issues meeting its goals even prior to the start of the pandemic. One way that the organization fell short of its goals last year was in terms of the number of women served. For instance, the paperwork distributed to ECW's corporate sponsors stated that the organization assisted 100 women per month, for a total of 1,200 women per year. However, the 2019 Annual Report showed that only 394 women were served, a figure that is 67% less than the projections found in the corporate paperwork.

In addition to not meeting its stated goal of serving an increased client base, the organization also struggled to achieve its goal of increasing the number of services available to clients. In the 2019 Annual Report, ECW stated it was unable to offer a multitude of standard programming, including mentoring, networking, skills development, and health and wellness programming to clients. These programs are integral to carrying out ECW's mission, as well as constitute programming required by the organization's national office. ECW listed preparation services as the only area where clients were served, though the description of what this included was vague. The number of women served, and the range



of programs offered are core aspects of the goals stated by the organization, yet both are areas where ECW failed to achieve the level of impact or implementation desired by the organization. To address this problem of practice as first identified by the ED, this capstone examines the factors contributing to ECW's struggle to implement its organizational goals of reaching more clients and expanding its programming.

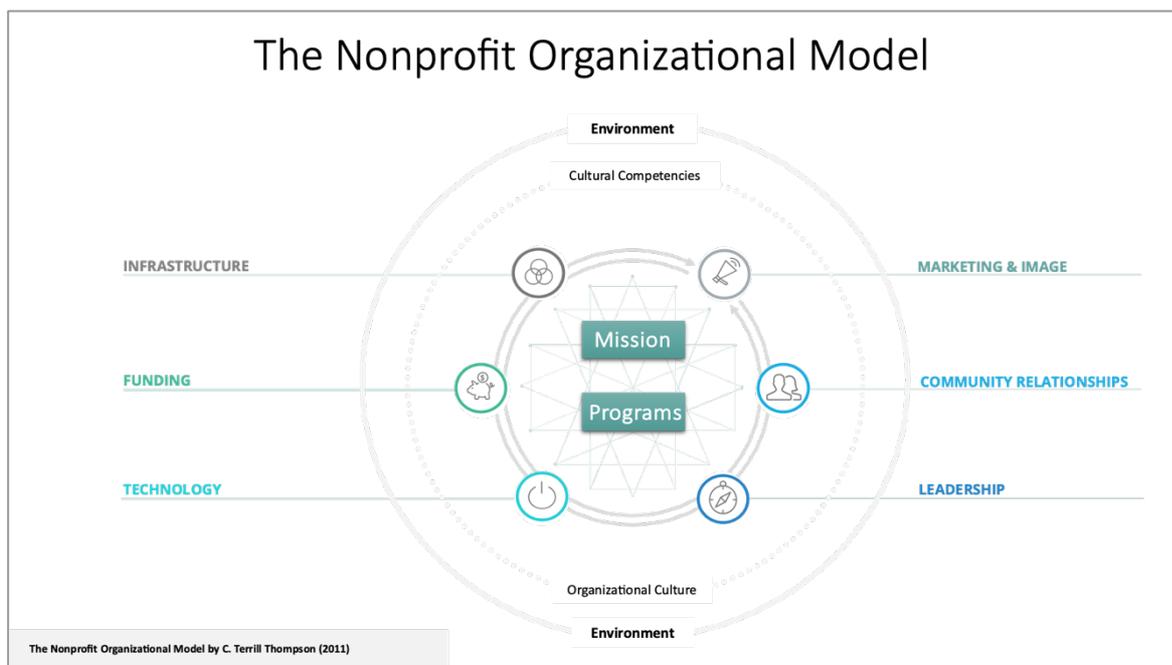
To uncover why ECW is struggling to fulfill its goals, our research team focused on key areas of the organization's leadership, infrastructure, and mission that are undermining goal attainment through the lens of the Nonprofit Organizational Model Framework. It is the aim of our research to produce several recommendations for improvement so that ECW can continue to expand services to women in need, a cause that is important to both the organization and our research team. This is important, as without a shift in current practices at the organization, some stakeholders believe that the organization will not be able to sustain its operations long-term.

## Conceptual Framework

The conceptual framework that informed our research efforts is the Nonprofit Organizational Model (Thompson, 2011). While multiple models exist in the for-profit industry, Thompson's model is uniquely applicable to nonprofit organizations. The model applies to analysis, assessment, planning, and the identification of interventions in nonprofit settings, taking into account the context of a specific organization (Thompson, 2011). The Nonprofit Organizational Model, as depicted in Figure 6, prioritizes the nonprofit organization's mission and programs at the center of the model. These components are viewed as essential to a nonprofit organization because it is the mission that guides all

decisions and actions and the programming that recruits the right individuals (Thompson, 2011). When closely aligned, the mission and programming propel an organization forward.

In addition to these two core aspects, additional internal elements as influenced by organizational competence, organizational culture, and the external environment at large, all play a role in shaping the nonprofit organization. It is important to note that each element of the model is equally important to the functionality and viability of the organization as the next element, and there is interconnectedness between elements (Thompson, 2011). A more detailed depiction of each element of the Nonprofit Organizational Model can be found in Appendix A.



*Figure 6: The Nonprofit Organizational Model, (Thompson, 2011)*

The Nonprofit Organizational Model aids nonprofit leaders, researchers, and practitioners in organizational assessments and interventions to help organizations achieve their stated vision, mission, and goals. While the elements in the model are clearly stated, when applied to an organization's problem of practice, Thompson (2011) suggests that they



should be adjusted to fit the context of the organization. For the purposes of this research study, the three elements identified to support a better understanding of ECW's problem of practice related to goal achievement are:

- **Leadership:** Leadership behaviors that support goal attainment.
- **Infrastructure:** Structural elements that support goal attainment.
- **Mission:** Organizational goal setting.

The following literature review provides an in-depth overview of the body of research that exists regarding leadership, goal setting, and infrastructure, as well as their impact on organizational goal attainment.

## Literature Review

There are a number of factors that influence a nonprofit organization's (NPO) ability to thrive. These internal and external factors, directly related to the context of the organization, might be overwhelming to NPOs attempting to discern which factors are in need of the most attention. To better grasp the many factors that contribute to goal attainment, this literature review focuses specifically on leadership behaviors, organizational goal setting, and structure. These elements provide a necessary foundation to guide our inquiry, findings, and ultimately recommendations with the purpose of helping ECW attain its goals.

### *Leadership Behaviors*

Leadership effectiveness is widely recognized as one of the essential elements for the growth and sustainability of a nonprofit organization. Agreeing on what makes leaders effective, however, is far more complicated because the definition of success in a leadership role can vary wildly based on what organization is being examined and who is conducting



the examination. In other words, a one-size-fits-all approach to examining the effectiveness of behaviors is not possible (Herman & Renz, 1998; Thompson, 2011). Still, research has identified several commonalities among successful leaders. Thompson (2011) stated that it is important for leaders to take ownership of implementing decisions and strategies that meet the needs and the context of the organization. Additional scholars have suggested a similar approach by advocating for organizational and contextually based goals, strategies, systems, and governing behaviors (Drucker, 1990; McClusky, 2002).

Another key leadership behavior cited in the literature is relationship building. Balser and McClusky (2005) suggest that the specific actions of a leader in a nonprofit organization are not as important as the ability of the leader to build relationships and to be consistent. This is because the leader's behaviors towards stakeholders in an organization can have a significant impact on the perception of that leader, and perception can matter more for stakeholders than actual behavior (Balser & McClusky, 2005; Wellens & Jegers, 2014). For example, since stakeholder groups are often interconnected, communication between these groups about any negative perceptions of the leader has the potential to undermine any goodwill the leader has cultivated within these groups through positive behaviors. However, if the leader has strong relationships and demonstrates consistent behaviors, perceptions based on rumors can be more easily dismantled.

The perception of a leader's behaviors in terms of whether they are considered an effective leader or not is also particularly important when considering the core workforce of a nonprofit organization is often composed of unpaid volunteers. Since volunteers are not contractually bound to the organization, they pose the risk of vacating their positions with little to no notice. As a result, nonprofit organizations that continue to rely heavily on volunteers and do not properly invest in a consistent standard of professional behavior and



relationship-building among their management and leadership staff create an unstable environment for their organization where the leader is left without the support he or she needs to successfully lead (Drucker, 1990).

Leadership styles also play a role in informing the behaviors of effective leaders. In the field of organizational leadership, there is a plethora of literature available regarding different leadership styles. However, for the purposes of this literature review, it is important to standardize what is meant by organizational leadership before exploring styles. According to Locke (1999), leadership is defined as “the process of inducing others to take action towards a common goal” (p. 2). Researchers have found that this process of moving others towards action is normally marked by participation in or promotion of collective goals, a buy-in to the work of the organization, the development of relationships, the building of trust, and the creation of a meaningful organizational identity (Locke, 1991; Locke, 1999; George, 2000). While this research does not promote a specific style, there appears to be a theme linking effective leaders with emotional competency and culture-building—qualities traditionally linked to a transformational leadership style (Locke, 1991; Locke, 1999; George, 2000).

Transformational leadership theory has emerged as one of the most popular approaches to understanding and assessing leadership effectiveness. First introduced by Burns (1978) and built upon by Bass (1985), this style of leadership focuses on how transformational leaders use charisma, personality, and unifying motivational rhetoric to build community and inspire change. For transformational leaders, culture is paramount. The culture that is built can assist in a greater buy-in to the vision and mission of the organization, increasing motivation and leading to feelings of empowerment for stakeholders within the organization (Bass & Avolio; Oзарalli, 2003). While the theory of



transformational leadership sounds ideal, recent studies explored whether this actually translates in a real-world setting.

One such study performed by Piccolo and Colquitt (2006) analyzes the effects of transformational leadership using cross-sectional data. In this study, researchers distributed surveys to a random sample of employees in a supervisory reporting capacity. Completed surveys were closely evaluated to determine the impact of transformational leadership on the employees' level of intrinsic motivation and goal commitment. Results from the study indicate that employees of transformational leaders perceived higher levels of job satisfaction, the perception of having rewarding and challenging tasks, and a heightened sense of autonomy (Piccolo & Colquitt, 2006; Hackman & Oldman, 1976).

In a study by Bono and Judge (2003) similar findings to those of Piccolo and Colquitt were produced utilizing survey data from a sample of nine businesses recruited to participate in the study. Yet again, the researchers found that there was increased engagement and confidence associated with those who perceived their supervisor to be a transformational leader. The results of both studies suggest that leaders can influence job perceptions by changing language, imagery, and symbols to reflect a transformational style. Alternative leadership styles may yield less positive results for moving organizations forward through follower empowerment. However, there is still merit in understanding how leadership behaviors, linked to styles, can impact follower perceptions (Barbuto, 2005; Bucic, Robinson & Ramburuth, 2010).

Transactional leadership is often referred to as a less effective alternative to transformational leadership. However, transactional leadership behaviors have been observed in studies to have benefits. Unlike transformational leadership, where leaders empower and motivate followers to rally around achieving a mission, transactional



leadership is marked by a reward system and a lack of leadership intervention until failure has occurred (Podsakoff, Todor, & Skov, 1982; Barbuto, 2005). In a foundational study by Podsakoff, Todor, and Skov (1982) the researchers evaluated the impact of rewards and punishments on employee performance. The researchers utilized a questionnaire distributed to 101 participants and performance evaluations from supervisors to determine if there was a significant link between transactional leadership and employee performance (Podsakoff et al., 1982). Results from this study demonstrated a link between rewards and performance indicators for individual employees but failed to find a significantly positive result with group-based rewards. In fact, group-based rewards were linked to higher levels of work dissatisfaction in high-achieving employees. Punishments seemed to have no significant impact on employee performance, whether individual or group-based (Podsakoff et al., 1982).

In contrast to this study, a later study by Bass, Avolio, Jung, and Berson (2003) found that transactional leadership can improve performance when there are rewards for meeting or exceeding expectations. However, in line with Geyer and Steyrer (1998), these improved performance metrics were only linked to short-term improvements. While transactional leadership is often seen as less inspirational than transformational leadership with its strict adherence to exchanges between management and subordinates, there is still a place for it if an organizational context benefits from the short-term effects of its implementation. Ultimately, leadership styles rarely produce as clear-cut results when observed in a real-world setting. For that reason, McCleskey (2014) argues that to meet emerging leadership needs, there should be less of a focus on adhering to a specific style and instead, a greater emphasis placed on leadership expertise, identity, and capacity.

Based on the current literature on leadership, it is clear that there is a connection



between the leader's behavior and style and their ability to effectively lead an organization. While the literature differs on what makes the best leader, and new findings continue to inform future directions of leadership training in the field, all styles and behaviors have in common the importance of quality interactions between leaders and subordinates. Effective communication between the two groups is a defining aspect of that interaction.

### *Leadership and Goal Communications*

Good leaders manage meaning and provide inspirational motivation to their subordinates. This type of communication is a necessity particularly for nonprofit organizations because volunteers' construction and interpretation of leadership communications can influence their task perceptions, intrinsic motivation, and commitment to goal attainment (Barrett, 2002; Husain, 2013). Smircich and Morgan (1982) suggest that organizational leaders help define and shape the reality of followers, asserting that the challenge for leaders is to manage meaning by using words, symbols, actions, and gestures so that followers orient themselves to achieving the desired goals of the leader. The application of this phenomenon in the real world has been explored in several research studies.

In an experimental and an archival study led by Carton, Murphy, and Clark (2014), for example, researchers found that leader rhetoric impacts followers' cognition, behavior, and performance. This alignment of efforts through effective communication aids in collaboration and coordination between leaders and followers, impacting the short and long-term performance of the organization by encouraging the pursuit of shared goals (Carton, Murphy, & Clark, 2014). In order to accomplish this alignment, the results of this study strongly imply that leaders use image-based rhetoric (rhetoric that allows individuals to see a clear picture of what is being asked) in conjunction with four core values or less



when speaking about the organization's ultimate goals (Carton et al., 2014). Leaders must also articulate a value that distinguishes their organization from others by integrating shared knowledge and experience to amplify stakeholder buy-in (Carton et al., 2014). Additional research supports these findings, demonstrating overall that there is a significant link between effective communication from leaders and team buy-in (Wright, 2007; Jensen, Andersen, Bro, Bøllingtoft, Eriksen, Holten, & Würtz, 2019). In other words, when leaders invest in purposefully communicating with their followers, the stronger sense of belonging and obligation to the shared vision that results helps the organization reach higher levels of success.

### *Goal Setting*

Goal setting and planning are equally instrumental to ensuring organizations succeed at the highest level. In exploring the role of goal setting and achievement, research finds that without clear and purposeful goals to hold organizations accountable, organizations struggle to meet the needs of clients and in some cases, their internal community (Thompson & McEwen, 1958; Fry, 1995). This assertion is especially true for nonprofit organizations due to the heavy reliance that organizations have on external stakeholders who not only volunteer for and fund their organization, but also who make up their client base (Pfeffer & Salancik, 1978; Thompson, 2011). Despite the unpredictable nature of being beholden to external forces, nonprofits can still mitigate some risks by engaging in goal setting and planning.

Though strategic planning is a more popular management approach for organizations in the private sector, nonprofit strategic planning has begun to gain momentum, supporting organizations in their quest for better performance metrics (George, Walker, & Monster, 2019). In a random-effects meta-analysis, scholars found that



strategic planning had a significant impact on performance effectiveness, especially in relation to whether organizations achieved their goals (George, Walker, & Monster, 2019). In addition to recognizing the validity of strategic planning for both the public and private sectors, the authors stated that beyond the initial establishment of goals, organizations should also engage in a strategic planning process whereby environments are considered, goals are accompanied by strategies, and the manner in which these plans will be implemented is solidified (George, Walker, & Monster, 2019). These findings underscore that more organizations should adopt strategic planning as a standard practice and are supported by a recent analysis from Bryson and George (2020), who added the caveat that context must be considered when organizations are utilizing strategic planning.

Organizations can be assured that strategic planning does not have to involve excessive resources or expertise. Rather, research shows that strategic planning at a basic level can still be accomplished through a simple assessment of imperative organizational goals and the actions necessary to achieve those goals (George, Walker, & Monster, 2019; Bryson & George, 2020). Still, especially for some small nonprofit organizations, strategic planning involves the dedication of time that an organization might not have (Mara, 2000; Hu, Kapucu, & Lauren, 2014). To circumvent these barriers, some research has suggested dividing up the work of planning among the departments to make the process more manageable (Nieboer, 2011). Departments can then come back together as a group to share their work and assemble the organization's plan (Nieboer, 2011). Silicano (1996) supports this idea of including staff in strategic planning, encouraging board leadership to act as supervisors who can provide feedback on external factors which may impact planning. While there is much support for strategic planning to advance effectiveness and performance, Doran (1981) states that it is imperative that organizations do not stop at the



planning phase, and instead consider how they can create measurable goals to inform leaders of progress as it occurs.

### *Organizational Performance Measures*

Nonprofit organizations, specifically its leadership, often face pressure from stakeholders and donors regarding communicating organizational performance and effectiveness in a transparent manner. Unlike for-profit organizations, nonprofits tend to operate within tighter financial margins, limiting their ability to invest in effectively measuring individual and organizational performance (Forbes, 1998). Kaplan (2001) builds on the importance of performance measures for organizations, stating that using financial metrics as the main evidence of success is no longer sufficient for nonprofit organizations because they are mission and program centered. For nonprofits especially, there should be a measure of clientele impact through services or goods supplied when considering the level of success achieved (Kaplan (2001). Despite the varied performance measurements suggested by Forbes (1998) and Kaplan (2001), there is evidence that nonprofits are still struggling to identify meaningful performance metrics due to ongoing challenges with data collection and expertise in performance management systems (Carnochan, Samples, Myers & Austin, 2014).

While it seems that external influences, such as donors, are increasingly demanding metrics that demonstrate the organization's effectiveness, there are still barriers in place to prevent this from happening, especially in small nonprofit organizations. In an exploratory study of mission performance utilizing questionnaires, researchers found that many of the participating organizations did not have performance management systems in place that would provide data on whether the organization had an impact on its mission (Sheehan, 1996). Instead, organizations listed activities like raising money or offering programming as



indicators of success. If nonprofits agree that their community impact should be a measure of success, simply referring to activities instead of impact is an insufficient way to quantify this measure (Kaplan, 2001).

Nonprofit organizations are looked to as the organizations that can “make an important contribution to our quality of life” (Sheehan, 1996, p. 110). When organizations resort to superficial measures to demonstrate success, there is a missed opportunity to show donors, stakeholders, and the community how their organization has a tangible impact on the lives of those they serve. Implementing a performance management system would help these organizations better capture the true impact that they are having on the community (Kaplan, 2001). Unfortunately, a standard performance model, framework, or metric does not exist for all nonprofit organizations to adopt. One option that has become increasingly popular with some organizations is the Balanced Scorecard (Kaplan, 2001). The Balanced Scorecard, as pictured in Figure 7, allows for organizations to determine what important metrics or measures should be examined in relation to their mission, values, vision, and strategy. Once organizations decide which measures they wish to evaluate with a performance measurement system, it is imperative that they begin to clearly and openly share these metrics with their stakeholders.

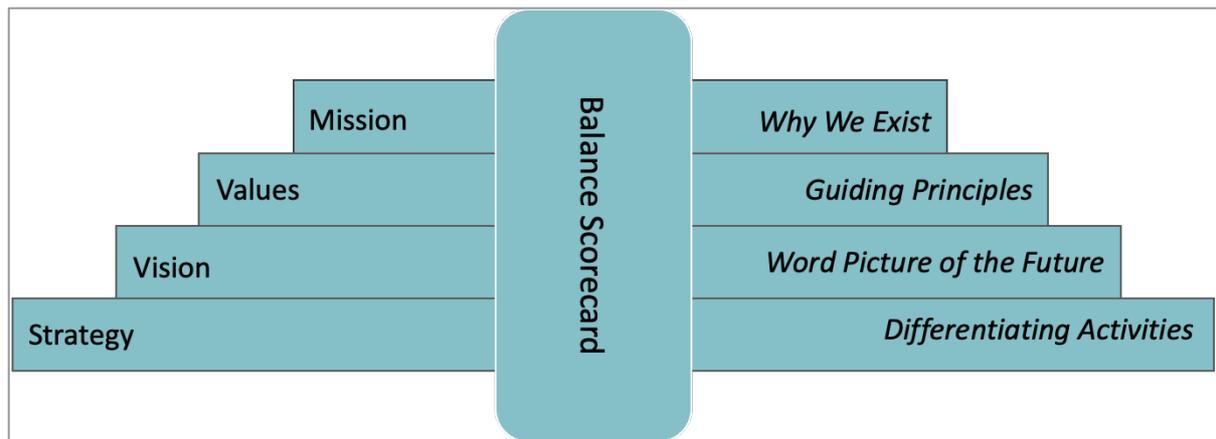


Figure 7: As adapted from Paul Niven's (2008) book, *Balanced scorecard: Step-by-step for government and nonprofit agencies*. John Wiley & Sons, p. 106.

Research contends that organizational performance measurement and management tools like the Balanced Scorecard can and should be used to support the executive management in communicating goals and aligning nonprofit employee or volunteer actions with the objectives of the organization's daily operations (Kaplan, 2001; Ronchetti, 2006). These measurements, when used as a communications tool, can be especially important in nonprofit organizations because they help to raise the staff's level of commitment and motivation, showing them how they are helping to make a difference.

#### *Organizational Structure: Leadership Roles and Responsibilities*

Structures of nonprofit organizations may change and evolve to meet the shifting needs of the organization. Thompson (2011) defines structure as an organization's internal pattern of relationships, authority, and communications. Although the literature on organizational structure is expansive, in the context of this section of the literature review, the focus will be on two elements of organizational structure: the roles and responsibilities of the nonprofit leader as well as leadership accountability regarding the nonprofit's board of directors.



Responsibility for an organization's success or failure is almost always attributed to its leaders. This is because the chief executive officer or executive manager in a nonprofit organization has a role that significantly contributes to the organization's trajectory. Heimovics, Herman, and Jurkiewicz (1995) claim that there is a psychological centrality associated with becoming a chief executive. In other words, when accepting this role, both the chief executive and others expect the executive to take considerable responsibility for organizational outcomes, whether good or bad (Heimovics, et al., 1995). These assertions are further reinforced by Drucker (1990) who suggests that there must be a clear process for identifying roles and responsibilities between the board of directors and executive management in order to better hold their executive managers accountable for achieving the organization's goals.

There is also research regarding board members' unclear leadership roles and responsibilities. Researchers have found that the roles of the board do not always match perceptions, and these discrepancies can become problematic when communication about these roles is unclear (Miller, 2002; Harris, 1989). Much like the perception of executives, the board's effectiveness is often assessed by arbitrary measures and personal perception of leadership behaviors (Nobbie & Brundey, 2003). However, the research on leadership responsibility continues to emphasize the need for clear communication and understanding regarding the role of board members (Heimovics, Herman, & Jurkiewicz, 1995; Drucker, 1990; Harris, 1989). Whether it relates to the board or executive leadership, ambiguity regarding roles and responsibilities can have a serious impact on long-term organizational growth and success.



### *Organizational Structure: Leadership Accountability*

In addition to the identification of roles and responsibilities, executive accountability is required to assess the performance standards of a nonprofit's chief executive. Michaels (1990) asserts that a major responsibility of the board of directors is to conduct ongoing, thorough, and transparent evaluations of its chief executive. While it seems as though this expectation should be understood as a contingency of the position, this requirement often goes unfulfilled, with boards acting in a transactional manner, only addressing leadership quality when a failure has emerged (Michaels, 1990; Podsakoff, Todor, & Skov, 1982; Barbuto, 2005). Michaels (1990) suggests that these evaluations are traditionally avoided due to a fear of confrontation. Instead of seeing evaluations as a means to examine where individuals can improve, they are seen as an opportunity for the board to criticize the executive (Goran Farkas, 2013; Michaels, 1990). Despite the fear of confrontation that may exist, it is the duty of the board to recognize the importance of accountability and build a culture of assessment so that evaluations can be used for their intended purpose of improving the executive's leadership abilities.

Boards are well within the parameters of their job description to implement measurement tools to assess their executive's performance. In fact, boards who develop controls to measure performance actually minimize the risk that problems go unaddressed and later manifest to cause damage to the organization, thereby increasing the overall well-being of their external stakeholders (Baysinger & Hoskisson, 1990). Two useful controls to measure performance identified in the research by Baysinger and Hoskisson (1990) are strategic controls (including an evaluation of the effectiveness of strategic plans and how leadership met or fulfilled objectives of the organization) and financial controls (performance and profit). Research by Zahra and Pearce (1989) confirms the need for



strategic and financial controls, as the board's responsibility is not to be involved in the day-to-day operations of the organization but to act as the governing oversight by consulting with and monitoring executives. Boards neglect their roles and responsibilities when they do not exercise the proper controls over their organization or appropriately evaluate the quality of their executive leadership.

#### *Future Directions in the Literature*

The literature on nonprofit organizations and the factors contributing to organizational effectiveness is continuing to grow. Perceived limitations regarding studying nonprofits are traditionally linked to a limited selection of peer-reviewed journal articles reviewing current trends, as well as a heavy focus on for-profit companies. While the plethora of available literature is marked with a deficit in nonprofit-specific research, some scholars believe this deficit is not as limiting as previously thought. For example, Emhan's (2012) study showed very little difference in employee happiness as it relates to leadership behavior when comparing for-profit and nonprofit industries, indicating that similar leadership techniques can be utilized in either context. Additional studies show the commonalities between these two types of organizations regarding leadership behavior and goal setting. These studies reveal that perhaps for-profit studies can be used to inform our understanding of nonprofit organizations until future nonprofit studies are available (Suykens, De Rynck & Verschuere, 2019; Dart, 2004). Reviewing the literature on both types of organizations provides a more holistic understanding of influential factors like leadership, goal setting, and organizational infrastructure and how they contribute to organizational goal attainment.



## Methods

Through in-depth inquiry and with interest in understanding how individuals make meaning of the problem at hand, qualitative researchers seek to explore phenomena, processes, and perspectives as they relate to the problem of study (Merriam, 2002). With this approach in mind, the purpose of this study is to understand which factors are impeding the accomplishment of ECW organization's goals. To address our problem of practice, the team utilized a qualitative approach to collect data through semi-structured interviews and document analysis.

### *Research Questions*

Utilizing the Nonprofit Organization Model framework to help guide the analysis of primary and secondary data sources, we developed the following research question: *What factors are impeding goal attainment at ECW?* Following the Nonprofit organizational Model, we focused on three sub-questions:

1. **Leadership:** How is the ED supporting organizational goal attainment?
2. **Infrastructure:** In what ways is ECW structured to support goal attainment?
3. **Mission:** How are goals communicated to and understood by the chapter?

In initial discussions with the ED, when both parties were still considering the viability of the partnership, the ED expressed concerns about recruiting and retention, roles and responsibilities, and the overall growth of the chapter. We developed our research questions to shed light on the critical issues holding ECW back from success, structuring our data collection and analysis to identify factors associated with leadership, goal communication, and organizational structure.



### *Primary Data Analysis*

We began our analysis with interviews with the ED, the board, and other key leaders within ECW. The purpose of the interviews was to better understand how people use sensemaking in their communities and organizations (Hox & Boeije, 2005). Our analysis draws from our interviewees' personal experiences within the organization and their attempt to make sense of where the organization is today.

### *Secondary Data Analysis*

Due to the small size of the chapter and resource constraints, this study includes secondary data or the reanalysis of data. Secondary data allowed our team to widen our understanding of the organization, giving additional insight into the dynamics, structures, and procedures at ECW that is not as easily captured through primary data collection (Vartanian, 2011). Furthermore, secondary data is flexible and provides a baseline understanding of the organization, which may serve to contradict or support assertions found in our primary data collection (Hakim, 1982). Thus, our utilization of secondary data is contextual when trying to understand the organization's history and gain additional insight into the data collected through primary collection methods.

### *Data Sets & Data Collection*

#### *Multi-Stakeholder, Semi-Structured Interviews*

From October 2020 to December 2020, the team conducted eleven participant interviews with members of the ECW's board and leadership. All interviews took place virtually via Zoom focusing on one participant at a time. A semi-structured approach was used for each participant over an equal amount of time, where they were presented with a set of open-ended questions. Each interview session allotted time at the end for follow-up questions and discussion.



## Participants

The interviews were conducted with ECW leadership—namely, the ED and board members. All participants were contacted initially by the ED to confirm consent. Once our research team received approval, we emailed each participant with a calendar so that interviews could be scheduled at times that were convenient for the participant. We requested that they schedule their interview on a day that they were available for a proposed one-hour block of time. Additionally, our team provided participants preparatory documents such as the media platform that would be utilized (Zoom) and a brief introduction to our team. The demographics of the final participants are detailed below in Figure 8.

Interview Participants Demographics	
<b>Gender</b> <ul style="list-style-type: none"><li>• 10% Male (1) Male</li><li>• 90% Female (10) Female</li></ul>	<b>Age</b> <ul style="list-style-type: none"><li>• 30-40: 17% (2)</li><li>• 41-50: 8% (1)</li><li>• 51 and above: 75% (8)</li></ul>
<b>Ethnicity</b> <ul style="list-style-type: none"><li>• 20% (2) Caucasian</li><li>• 90% African American/Black</li></ul>	<b>Professions</b> <ul style="list-style-type: none"><li>• Entrepreneur 8% (1)</li><li>• Consultant/Advisor 17% (2)</li><li>• Executive Leadership 75% (8)</li></ul>

*Figure 8: Interview Participant Demographics, (East Coast Women)*

## Interview Questions

Our team designed open-ended interview questions to encourage participants to share their experiences and perceptions in a storied form without feeling as though there was a right or wrong answer. The questions also provided the team with an alternative perspective from that of the ED. This semi-structured approach allowed for follow-up clarifications and discussion, which assisted the team in uncovering new information previously not addressed with the ED. The question bank used to guide interviews included, but was not limited to, the following questions displayed in Figure 9:



Research Question	Interview Questions
<b>Leadership:</b> How is the ED supporting organizational goal attainment?	<ul style="list-style-type: none"> <li>• What sets this chapter apart from others?</li> <li>• Describe the organization’s vision and mission. Do you believe that all members of the organization (paid staff and volunteers) understand the vision and mission?</li> <li>• Describe the organization’s values. If the organizational values are not defined, please list some which you believe should be integrated within the organization.</li> <li>• How would you describe the culture of the organization?</li> <li>• How is the organizational culture sustained and improved?</li> </ul>
<b>Infrastructure:</b> In what ways is ECW structured to support goal attainment?	<ul style="list-style-type: none"> <li>• How would you define leadership exhibited in the organization?</li> <li>• Please describe the leadership changes that have occurred and the impact they have had on the organization.</li> <li>• Does the organization have a succession plan in place for senior staff members, including the director?</li> </ul>
<b>Mission:</b> How are goals widely shared and understood by the chapter?	<ul style="list-style-type: none"> <li>• What are the organization’s main strategic goals for the next two years? Where are these opportunities for growth (improvement) and where do you feel there are challenges that need to be addressed?</li> <li>• Describe your strategic planning process. Who is involved? How do you reach consensus on the right goals for the organization? How are decisions made and implemented throughout the organization?</li> </ul>

Figure 9: Interview Questions Linked to the Research Questions

After each interview, the team conducted a debrief to become more familiar with the transcripts. We compared notes, combined feedback, and later aligned responses to our research questions.

*Secondary Documentation Analysis*

Our research team conducted a secondary analysis of 15 sources, including documentation like the 2019 Annual Report, the 2018 Volunteer Handbook, training materials, corporate sponsorship materials, and the organization's website. All secondary sources utilized in the study were either given to the team by the ED or available on the open web. Once again, the team aligned each source to one or more corresponding research questions as depicted in Figure 10.



Research Question	Secondary Data
<b>Leadership:</b> How is the ED supporting organizational goal attainment?	<ul style="list-style-type: none"> <li>● Communications Committee Presentation</li> <li>● Annual Report 2019</li> <li>● Referral Program documentation</li> <li>● May Board Meeting Presentation</li> </ul>
<b>Infrastructure:</b> In what ways is ECW structured to support goal attainment?	<ul style="list-style-type: none"> <li>● ECW’s website</li> <li>● Overview Card (ECW Affiliate)</li> <li>● Communications Committee Presentation</li> <li>● Annual Report 2019</li> <li>● Coaching Process Documentation (Training)</li> <li>● Program A Coach Training Presentation</li> <li>● Volunteer Program B Training</li> <li>● Referral Program documentation</li> <li>● May Board Meeting Presentation</li> <li>● Internship Documents</li> <li>● Volunteer Handbook 2018</li> </ul>
<b>Mission:</b> How are goals widely shared and understood by the chapter?	<ul style="list-style-type: none"> <li>● ECW’s website</li> <li>● Overview Card (ECW Affiliate)</li> <li>● Preparation Program Sponsor Letter</li> <li>● Corporate Sponsorship Packet</li> <li>● Communications Committee Presentation</li> <li>● Annual Report 2019</li> <li>● Coaching Process Documentation (Training)</li> <li>● Program A Coach Training Presentation</li> <li>● Volunteer Program B Training</li> <li>● Referral Program documentation</li> <li>● May Board Meeting Presentation</li> <li>● Internship Documents</li> <li>● Marketing Calendar June-December 2020 (Published without COVID-19 Corrections)</li> <li>● Volunteer Handbook 2018</li> </ul>

Figure 10

*Analysis of Primary Data*

Utilizing a thematic analysis approach, the team collected and analyzed all interview transcripts. We created preliminary codes to describe the content, searching for patterns or themes related to our research questions. Once we were familiar with the data, we uploaded the data into the qualitative analysis software Quirkos to complete the coding. In



Quirkos, we began combining codes by themes found in the Nonprofit Organizational Framework. Table and Figure 11 represents the results of our analysis of primary data.

Theme	Code (Occurrence)	Description	Supporting Quote
Leadership	ED (55)	Reference to the ED	<ul style="list-style-type: none"> <li>• “The ED knows what she’s doing, but ultimately we need a full-time person”</li> <li>• “I don’t think currently the ED is terrific, her management style is such that she isn’t the best communicator”</li> <li>• “The ED loses focus at times”</li> <li>• “We thought the transition would be easier for her, and it was not”</li> <li>• “The ED is not a day-to-day person who is going to roll up her sleeves”</li> <li>• “The ED’s part-time compensation is \$90,000 and I would like to reduce that”</li> <li>• “There’s no willingness to change and that is detrimental”</li> <li>• “She needs to change the dinosaur model into today’s model into the technology field because like that’s what needs to happen for ECW”</li> </ul>
	Conflict (22)	Mention of a disagreement	<ul style="list-style-type: none"> <li>• “When I have a different opinion, even though we vote, it sometimes comes down to one or two people”</li> <li>• “The ED and I have had some big arguments, right, because I see things differently than she does”</li> <li>• “We probably have lost some really good volunteers because they didn’t feel a connection with leadership”</li> <li>• “Consensus comes down to who is the loudest and who can hold on the longest”</li> <li>• “It’s a power struggle that plays out in meetings, it plays out all the time”</li> <li>• “It’s contentious”</li> </ul>



Theme	Code (Occurrence)	Description	Supporting Quote
			<ul style="list-style-type: none"> <li>• “She puts thing on the agenda, to talk about, as if it’s already been decided”</li> </ul>
	Communication (11)	Exchange of information	<ul style="list-style-type: none"> <li>• “Improving the lines of communication so that we know what’s going on in the office from day to day, and what projects”</li> <li>• “Need them to lead by example and have consistent communications”</li> <li>• “Communication could definitely be improved”</li> <li>• “Miscommunications...there could be improvement within the scheduling of volunteers”</li> <li>• “You have to communicate and take the time to go through things with the board”</li> </ul>
	Management (7)	Coordination and administration of tasks	<ul style="list-style-type: none"> <li>• “We need someone in there to run day-to-day operations”</li> <li>• “It’s always going to be ongoing, you know, the program manager”</li> </ul>
	Leadership (6)	Reference to someone as a leader within the chapter	<ul style="list-style-type: none"> <li>• “I believe in collaboration and there should be more”</li> <li>• “We’ve probably lost a lot of good volunteers because they didn’t feel a connection with leadership”</li> </ul>



Theme	Code (Occurrence)	Description	Supporting Quote
			<ul style="list-style-type: none"> <li>• “Loyalty of leadership is really important. People want to be engaged not just with the mission”</li> </ul>
<b>Infrastructure</b>	Roles & Responsibilities (9)	Reference to a position on the team and/or tasks and duties of a particular role or job description	<ul style="list-style-type: none"> <li>• “Ideally the ED position would be doing both or someone doing business development and someone running operations”</li> <li>• “We need to understand what are the different roles that we are going to need on a consistent basis not just in the short term or as needed”</li> <li>• “We need a structured and maintained organizational structure”</li> </ul>
	Recruiting & Retention (18)	Comments regarding recruitments and retention	<ul style="list-style-type: none"> <li>• “That's why they come to ECW, because they're excited about making a difference”</li> <li>• “This is the third head of the board that I've worked with”</li> <li>• “She wasn't getting what she needed form the ED, so she left and it's been a struggle to get us back to a systemic approach”</li> <li>• “We've had too much transition”</li> <li>• “From when I joined, the only person who is still around is the ED”</li> <li>• “Her and the ED didn't click, so she's gone, and I suspect some of the people that came with her are going to be gone shortly”</li> <li>• “I think it's a 50/50 you get them to stay...and it's already a small board that has to do a lot”</li> <li>• “I don't think she's going to be able to retain us”</li> <li>• “Some of them are just here to say, hey, I'm with ECW and some are hard workers”</li> <li>• “One ED was able to really move the needle and then she abruptly left”</li> <li>• “We haven't created a value proposition that makes it attractive for board members”</li> </ul>



Theme	Code (Occurrence)	Description	Supporting Quote
	Decision-Making (8)	How the board comes to consensus	<ul style="list-style-type: none"> <li>• “Sometimes I have felt when I had a different opinion, that even though we vote, it sometimes comes down to one or two people”</li> <li>• “A lot of the decisions that are made and implemented throughout the organization really come from me and the ED”</li> <li>• “There’s a small group that makes them, typically the ED and the head of the board”</li> <li>• “Once the infighting gets started, you know, the natural inclination of people is I’m just going to be quiet”</li> <li>• “By the time it gets to us it's pretty flushed out”</li> </ul>
	Challenges (13)	An issue or obstacle	<ul style="list-style-type: none"> <li>• “I didn’t know what was going on, you know, being a volunteer board member”</li> <li>• “We haven’t gotten to a financial position where we’re self sufficient</li> </ul>
<b>Mission</b>	Vision (10)	An idea of where the chapter should be in the future	<ul style="list-style-type: none"> <li>• “We don’t have enough revenue streams”</li> <li>• “We don’t have a defined set of values”</li> <li>• “We execute and think very small and narrowly, we don’t think broadly”</li> <li>• “We need to be clear on the type of culture we’re trying to establish”</li> <li>• “We don’t engage much with the volunteers”</li> </ul>



Theme	Code (Occurrence)	Description	Supporting Quote
	Goals (15)	A success point in the future	<ul style="list-style-type: none"> <li>• “A richer culture commitment from those within the organization and an overall strategy for how to sustain success and how the chapter could grow into the future”</li> <li>• “I think fiscal responsibility is the value that we probably need to add”</li> <li>• “Quite honestly, you can’t fundraise unless we show statistically who we’re helping. How many people we’re helping because people give money based on numbers”</li> <li>• “I think broadening the diversity of the board is important and everybody understands that it's important”</li> <li>• “We need a more cohesive plan on how to generate revenue”</li> <li>• “Our revenue is very low compared to other chapters and for what the impunity is in DC”</li> </ul>
	Strategy (6)	A plan that specifies how ECW will allocate resources to support activities	<ul style="list-style-type: none"> <li>• “Sometimes the work bees have a better strategic vision”</li> <li>• “I don’t think we have a strategic planning process”</li> <li>• “Because we don’t have a strategy we can never say does that support our strategic plan? Does this move our goals forward? How does that impact us?”</li> <li>• “We haven't moved forward; we haven't put solid plans in place”</li> </ul>
	Programs (10)	Special events or projects geared to accomplishing a specific goal	<ul style="list-style-type: none"> <li>• “We need to focus on people making \$500 a year or more, which is the X program”</li> <li>• “People who are in the X programs founders group donated \$1000. So, now we’re asking them to come make that donation again”</li> <li>• “Kendra Scott gave us some jewelry that we were able to give to what we call our X program circle”</li> </ul>



Theme	Code (Occurrence)	Description	Supporting Quote
			<ul style="list-style-type: none"> <li>“Coaching and the X group once women get a job”</li> </ul>

Figure 11: Analysis of primary data

### Analysis of Secondary Data

We approached our analysis of secondary sources using the same thematic analysis strategy that we used to analyze our primary data. Referring to the Nonprofit Organizational Model once more, we organized our codes and narrowed our analysis of the documents to relate only to our research questions. However, unlike our primary data analysis, we chose to not utilize software to analyze secondary sources and instead coded the documents by hand. We did this so that the team could make a collective decision about the relevance of certain sources to our research questions. Figure 12 represents our analysis of secondary data for the two main documents of merit. The remainder of the secondary analysis is available in Appendix B.

Source Type	Description	Theme	Code	Supporting Evidence
Annual Report 2019	Submitted by Director of Programs February 7th (Started) February 14th (Finished) Web-based	Mission (Goals)	Sponsorship	<ul style="list-style-type: none"> <li>No fiscal sponsors</li> </ul>
			Programs	<ul style="list-style-type: none"> <li>Client services available 15 hours per week/3 days</li> <li>750 appointments for services for 2020/394 listed as being served in 2019</li> <li>Only served women in preparation programming, no other programs had listed clients served (6 programs listed with 0 clients)</li> <li>Question asking how many women fulfilled their goal after completing services has “respondent skipped this question” as response</li> <li>Questions for including data tracking of clients and achievements of their stated goals: “Respondent skipped this question”</li> </ul>
			Goals	<ul style="list-style-type: none"> <li>N/A</li> </ul>

Source Type	Description	Theme	Code	Supporting Evidence
		<i>Leadership</i>	<i>Programs</i>	<ul style="list-style-type: none"> <li>Led by ED- 3 events               <ul style="list-style-type: none"> <li>Event 1: Raised: \$100,000; Cost \$20,000</li> <li>Event 2: Raised: \$8,788; Cost: \$800</li> <li>Event 3: Raised: \$25,000; Cost: 1,000</li> </ul> </li> <li>Services offered: Facilitator-shows no clients; Counseling shows 30 clients (contradicts number previously referenced in document - 0); Networking- 0 clients</li> <li>Individuals who met goals established: 0</li> <li>Community outreach through mobilized efforts- “respondent skilled this question”</li> <li>Plan to start additional programs in 2020. No</li> </ul>
			<i>Parent Company</i>	<ul style="list-style-type: none"> <li>Assistance requested from the parent company. Notes show that the parent company sent a notable speaker to an event which helped to “elevate the reputation of” ECW. The parent company representatives helped to connect this branch with a major sponsor, helped to improve PR campaign, implement technology systems, fundraising experts.</li> </ul>
		<i>Infrastructure (Organizational Structure)</i>	<i>Board</i>	<ul style="list-style-type: none"> <li>Board president contact</li> <li>Advisory Board (2 individuals) No meetings in 2019</li> <li>Advisory board- Top corporate Sponsors</li> <li>Plan for expansion by Summer 2020</li> <li>12 members listed on board</li> <li>Demographics (83% African American, 17 % Caucasian; 92 % female, 8 % male; 75% over 45, 25 % under 45 years old; Professions listed as Entrepreneurs, Executives, Attorneys</li> <li>No referral agencies on board</li> <li>No former clients on board</li> <li>Get/Give policy (\$5,500)- 75% fulfilled; \$10,000 personally donated by board members.</li> </ul>
			<i>Staff Members</i>	<ul style="list-style-type: none"> <li>Two staff members listed (Executive Director-paid, Director of Programs -unpaid)</li> <li>Less than 8 staff members as reported</li> </ul>
			<i>Volunteers</i>	<ul style="list-style-type: none"> <li>100 Active Volunteers</li> <li>125 Total Volunteers</li> </ul>
			<i>Community</i>	<ul style="list-style-type: none"> <li>32 active referral agencies</li> <li>105 total referral agencies</li> <li>Formal process for including agencies</li> </ul>



Source Type	Description	Theme	Code	Supporting Evidence
May Board Meeting Presentation	Updated June 8, 2020 (Google Drive)  PPT February 7th (Started) February 14th (Finished)  Web-based	Infrastructure (Organizational Structure)	<i>Agenda</i>	<ul style="list-style-type: none"> <li>• Topics of discussion and presenters (with titles)</li> <li>• 2019 Annual Report summary along with details on team which completed the report.</li> </ul>
			<i>Policies and Procedures</i>	<ul style="list-style-type: none"> <li>• Necessary manuals for operation (to be created- what it should include)</li> </ul>
			<i>Technology</i>	<ul style="list-style-type: none"> <li>• Software assets needed to move services online with quotes for the usage of these programs.</li> <li>• Training to be planned for volunteers and staff on technology use starting June 1, 2020</li> </ul>
			<i>Staffing</i>	<ul style="list-style-type: none"> <li>• Recruited and trained 2 new coordinators (communications and fundraising)</li> </ul>
			<i>Programming</i>	<ul style="list-style-type: none"> <li>• Inventory of resources needed for programming</li> <li>• Grants being pursued in conjunction with partner organization to support future program needs</li> <li>• New program launched. PowerPoint gives an image and name of program but no description.</li> <li>• Virtual programming is detailed including resources which will be available.</li> <li>• Data provided for progress: 223 referral partners identified, 30 connected with, plan to contact an additional 127 partners</li> <li>• Shift in programming for the networking department.</li> </ul>
			<i>Goals</i>	<ul style="list-style-type: none"> <li>• Goals listed (support growth, build a network, mentor, advocate, identify opportunities, provide a space to talk). Calendar shifted to accommodate online meetings. Planned for one each month with a new theme.</li> <li>• Plan to relaunch all programming in Fall 2020.</li> </ul>
			<i>Leadership</i>	<ul style="list-style-type: none"> <li>• Outlined Social Media Campaign</li> <li>• Additional COVID-19 resources added to help clients virtually</li> <li>• Published applicable community events to be held in 2020 for clients (19 events- not sponsored by ECW)</li> <li>• Operational strategy presented by Executive director detailing organizations history (included time the organization has been in operation, location of organization, and highest year of fundraising \$250,000- year not specified)</li> <li>• 2019 hired the current executive director to “rebuild” the organization; revamped the board to increase “strength;” Held inaugural event, moved forward for plans to implement new programs</li> </ul>

Source Type	Description	Theme	Code	Supporting Evidence
				<ul style="list-style-type: none"> <li>2020 Goals listed (goals listed in past tense- include the four elements of the 2019 rebuild listed above). Also includes " Raised \$200,000; moved locations, developed additional sponsorship relationships, and started new program</li> <li>Organizational chart published (all positions listed as filled, 2 paid staff positions listed - ED, Program Head)</li> </ul>
			<i>Outreach</i>	<ul style="list-style-type: none"> <li>Details on pre-COVID plans and current plans. List of pre-COVID shows in person services with quotas for clients (60 per month). New plans remove quota, move to completely virtual platform, includes fundraising initiatives continuing for corporate, individual donors.</li> <li>Current Budget (March-June) including changes due to COVID (Original cost \$14,850/ New Cost due to COVID changes \$18,430).</li> </ul>

Figure 12: Secondary Analysis of ECW Sources

## Summary of Findings

### ***Finding 1: Many feel important ED roles are not being filled.***

ECW has a unique opportunity to serve a diverse community and fundraise in a city that donates over \$894 million to charities each year due to its location in a large metropolitan area (Davis, Lindsay, & O’Leary, 2017). Still, nonprofit management is complex, particularly in a challenging year like 2020 with the onset of the COVID-19 pandemic. The organization has also experienced a lot of stress due to internal factors and unprecedented external challenges. Regardless of the ED’s culpability in shaping these factors, the successes and failures of the organization have been in large part perceived to be associated with the quality of the ED’s leadership.



To answer our first research question (how is the ED supporting organizational goal attainment?), we found that many participants were not convinced that the ED positively contributed toward goal attainment. In fact, the ED had cultivated very little loyalty amongst board members, with many noting that the environment can often get very “contentious” with “infighting” and a reliance on a battle of wills to decide the direction of the organization. Another interviewee stated that “I don’t think currently the ED is terrific. Her management style is such that she isn’t the best communicator.” This sentiment was heard in several interviews as other members expressed issues around retention, stating, “We’ve probably lost a lot of good volunteers because they didn’t feel a connection with leadership” and “I don’t think she’s going to be able to retain us.”

**“Loyalty of leadership is really important. People want to be engaged not just with the mission”**

The document analysis supports the board members’ concerns regarding the ED’s communication style, demonstrating that the ED failed to properly communicate to the board any plans for the future of the organization. Of the materials that were given to the research team, only two documents outline plans and programming. These materials include the May 2020 board meeting PowerPoint and the 2019 Annual Report, both of which are documents that are not shared with non-leadership volunteers. Additionally, our team found that the documents used for training new volunteers are too generic in that they are geared towards the global organization rather than specific to this affiliate. Each training document focuses on the volunteer’s commitment to the organization, their job description, their responsibilities (listed as checklist items), and a listing of available resources. Very little to no personalization of the training documents is seen, specifically as it relates to the impact volunteers are having on their community. The lack of a shared



cognition through overly general training materials may be another element causing a disconnect between the ED and volunteers, leading to feelings that the ED is not communicating effectively. Our findings from the training documents and board interviews support the idea that the ED role is not being fulfilled in a manner that will allow the organization to meet its goals.

It is our understanding that although there are many factors at play, the ED carries a lot of the burden for the organization's underperformance in the eyes of the board. A lack of followership, poor communication, and the perception that the ED does not value the opinions and commitment of others, has not only made the ED the target of negative criticism but also has made her ineffective at carrying out the organization's goals. The affiliate may find itself in serious jeopardy if the ED's communication issues persist.

***Finding 2: The ED does not have clearly defined roles and responsibilities.***

The ED is not the only one at fault for the state of the organization, however. It may well be that the shortcomings perceived to characterize the ED's leadership stem from a lack of clear expectations from the board. To address this possibility, it is critical for the board to develop and collectively communicate clearly defined roles and responsibilities to the ED. In addition, the board has an obligation to oversee the ED and hold her accountable for her performance. It is not clear whether such oversight has been exercised in the past. Interview data tells us that the board has divided the work of the ED into two categories: 1) day-to-day operations and administrative tasks and 2) external communications and fundraising. However, there is a disconnect between the ED and the board's understanding of ED responsibilities, leading to conflict and a lack of cooperation. This may be because the ED has more intimate institutional knowledge of the organization, having served in various positions during her long tenure with the organization before becoming the ED. The ED also



has her own ideas of what contributes to the success of an ED—ideas which might differ from those of the board members.

While examining our second research question, (In what ways is ECW structured to support goal attainment?), we discovered that it is unclear what the roles and responsibilities of the ED are, with some believing that "ideally the ED position would be doing both" operations and development, or that these positions would be split between two individuals with "someone doing business development and someone running operations." In contrast, others were not sure how to answer the question, responding in part, "I didn't know what was going on, you know, being a volunteer board member." It was also shared that the ED may not be the right fit, as some doubted her ability to get the job done regardless of whether she was aware of the stated responsibilities of her role.

**“The ED is not a day-to-day person who is going to roll up her sleeves”**

Document analysis supports our interview findings by showing that there is no physical resource documenting the expected roles and responsibilities of the ED. This is in spite of the fact that other positions, such as those that relate to programming, mentoring, and referrals, all have training manuals that explicitly provide a checklist of responsibilities and an overview of the position’s role. To further explore whether the ED’s roles and responsibilities are described in detail in any public documents, our team conducted a thorough examination of the website. We found that although the ECW’s website mirrors the parent organization’s website with information on programming, mission, and resources geared towards clientele, there was no specific information regarding the roles or responsibilities of the ED. This lack of clarity in job responsibilities may be another element contributing to the inability of the ED to lead the organization effectively.

***Finding 3: An absence of goals has led to a lack of accountability.***



Nonprofits exist to serve the community and rely heavily on public trust. Donors and sponsors want to know where their money is going and who has been assisted with it. They also want to partner with brands that have excellent name recognition, pursue a reputable mission, and avoid controversy (Kylander & Stone, 2012). Our final finding highlights how critical accountability is to an organization's success and how goal identification is necessary to ensure that the ED provides the board with what they need to be effective in their role.

In answering our third research question (How are goals widely shared and understood by the chapter?), we found that the organization does not have shared goals nor has it made public any performance metrics regarding programs, services, or fundraising. When asked about goals and accountability, one respondent answered by stating, "Quite honestly, you can't fundraise unless we show statistically who we're helping and how many people we're helping because people give money based on numbers." This quote and others that shared similar sentiments, led our team to recognize a pattern in which a lack of goal identification made it impossible for the board to hold the ED accountable.

**"I think fiscal responsibility is the value that we probably need to add"**

Our documents analysis supported this assertion with only one stated goal visible in the 2019 Annual Report and an additional goal located in the May board meeting document. In the Annual Report document, the ED answered "750" in response to the question of "How many individual women do you hope to serve in 2020?" No further explanation was given in the Annual Report document as to how the organization plans to achieve this goal or why this number was selected. The Annual Report does include a question regarding how successful ECW was in offering services that helped clients achieve their goals, but this question was ultimately skipped. The only data pertaining to the organizational impact that



the research team found in the Annual Report was regarding the total women served in 2019 (394 women).

The second and only other document that references goals is a PowerPoint presentation from the May 2020 Board meeting. The agenda for this meeting includes a reference to goals linked to the operational strategy update given by the ED. However, upon further examination of these goals, titled “Looking Forward- 2020 goals,” every goal except for one is written in the past tense, indicating that they were already accomplished. These goals included “hired an ED,” “held first fundraising breakfast event,” “raised close to \$250,000,” and “developed corporate sponsor relationships.” The only goal not stated in the past tense was “expand program offerings,” however there were no further details on any new types of programs or how this expansion would be implemented. Goals written in the past tense despite their presentation as goals for the 2020 year, communicates that the organization does not have measurable goals that can be used for accountability purposes moving forward.

## Recommendations

The following recommendations for ECW are based on the findings of this research study and evidence-based practices in goal setting, leadership, and organizational structure.

***Recommendation 1: Identify and effectively communicate ECW organizational goals.***

Findings from the data analysis indicate that ECW has two main organizational goals: increase client load and program expansion. However, these goals are not supported by any formal planning accounting for how these goals are to be achieved and measured and who should be involved in goal attainment efforts. As evidenced in Silicano’s 1996 study on the relationship between planning and measured success in nonprofit organizations, planning



significantly affects performance. This sentiment has since been echoed in subsequent studies, explicitly linking clear strategic planning and communication of goals to increased organizational effectiveness and achievement (Green & Griesinger, 1996; Cornforth, 2001). As a result, our research team proposes that ECW identify and effectively communicate its goals. Based on current research regarding the effectiveness of S.M.A.R.T goal planning in numerous organizational contexts (Doran, 1981), the best way that ECW can clearly identify their organizational goals and create specific objectives for their organization is by utilizing the S.M.A.R.T criteria as outlined in Figure 13 below. Once S.M.A.R.T objectives are created to support goal identification, ECW should work to develop an action plan for the implementation stage.

<b>Specific</b>	Organizations should identify and target the specific area they hope to improve.
<b>Measurable</b>	Organizations must find a way to collect quantitative data to measure their progress and ultimate achievement of the goal.
<b>Assignable</b>	Organizations must indicate who will be responsible for each objective designated within the goal.
<b>Realistic</b>	Organizations must be realistic in what they can achieve given their current human capital and resource allocations.
<b>Time-related</b>	Organizations must attach a timeline to objectives, designating when the organization believes it will be possible to achieve their specified goals and objectives.

Figure 13: S.M.A.R.T.

Note: Adapted from “There’s a S.M.A.R.T. way to write management’s goals and objectives” by G. Doran, 1981. *Journal of Management Review*, 70, 35-36. <https://community.mis.temple.edu/mis0855002fall2015/files/2015/10/S.M.A.R.T-Way-Management-Review.pdf>

Even the best goals are meaningless until they can be properly communicated to others within the organization. The last step of goal setting is for ECW and especially its ED



to communicate its goals using the most effective communication tools and channels.

Research suggests that leaders use intentionally crafted rhetoric in such a way that shared cognition is promoted, meaning that the staff not only share the same understanding of the goals of the organization, but they also share a sense of purpose (Carton, Murphy, & Clark, 2014). ECW must therefore be consistent and continuous in their communication of goals and objectives to stakeholders. Although the recommendation in the study is for ECW to identify, create, and implement goals and objectives through their own action plans, we have provided a prototype of ECW goals for the organization to build upon in Figure 14. The goals identified in the prototype are tied to elements identified in the Nonprofit Organizational Model (Thompson, 2011).

Prototype of ECW Goals	
Goal	Elements of Nonprofit Organizational Model
<p><b>Goal 1</b>  <i>Program and service development and delivery—</i> Strengthen the reach of current ECW programs and implement new and accessible ECW programs that are impactful and results-oriented in order to support more women facing economic hardships pre- and post-COVID-19.</p>	<p><i>Mission, Programs, and Technology</i></p>
<p><b>Goal 2</b>  <i>Funder and donor development for financial sustainability—</i> Identify new funding streams to support financial sustainability and growth and ensure that all financial investments and activities align with ECW strategic goals and objectives.</p>	<p><i>Funding</i></p>
<p><b>Goal 3</b>  <i>Organizational leadership and governance—</i> Create a culture and environment that empowers all members of ECW to grow and thrive.</p>	<p><i>Leadership, Infrastructure, Culture, and Competence</i></p>



Prototype of ECW Goals	
Goal	Elements of Nonprofit Organizational Model
<p><b>Goal 4</b>  <i>Community Engagement and Volunteering</i>— Build a network of committed volunteers who are dedicated and motivated to continually support ECW in achieving its goals.</p>	<p><i>Community Relationships</i></p>
<p><b>Goal 5</b>  <i>Communications</i>—Strengthen communications to cultivate a shared purpose and commitment both inside and outside of ECW.</p>	<p><i>Marketing and Image, Culture, and Competence</i></p>

Figure 14: Prototype of ECW Organizational Goals

**Recommendation 2: Develop and implement performance metrics to measure ECW’s goal attainment.**

Once ECW identifies and communicates its organizational goals, the organization must then determine appropriate performance metrics to assess levels of goal attainment. This recommendation is informed by our finding that each stakeholder group had a different opinion on ECW’s level of goal attainment and overall performance. ECW can prevent this problem from reoccurring by developing a standard performance metric whereby all stakeholders can gain an accurate picture of the state of the organization. Kaplan (2001) supports this idea that performance management systems or metrics are necessary for nonprofits to evaluate organizational outcomes, arguing that these tools empower nonprofits to move away from a simple assessment of the success of any one initiative or program to better visualize how all programs, initiatives, or activities work together to support an organization in meeting their intended outcomes.



***Recommendation 3: Strengthen the leadership of the ECW ED by creating a performance evaluation and conducting a performance evaluation each year.***

A major responsibility that an organization's board has is conducting ongoing evaluations of its chief executive (Michaels, 1990). By forgoing this responsibility, boards hinder the organizational planning and accountability required for their organization to achieve its goals. Researchers have long advocated for nonprofit boards to take ownership in creating an organization-specific performance evaluation in lieu of placing that responsibility on external consultants or adopting generic performance evaluation tools implemented by other organizations (Michaels, 1990; Leblanc, 2016). Thus, our research team recommends that the ECW Board of Directors create an ED performance evaluation that they conduct regularly or at least on an annual basis. To help guide and support the ECW Board of Directors in following this recommendation, our research team suggests the implementation of the following action plan, identified in three parts:

- Part One: Adopt the framework for performance evaluation proposed by Michaels (1990) to build a custom ECW performance evaluation for its ED. The framework and corresponding steps are outlined in Figure 15 below.
- Part Two: ECW Board of Directors provides a formal, written review of performance each year. A formal, written review benefits the ED because it provides a report on the ED's progress as measured against identified organizational and leadership goals. This review also gives each board member an opportunity to reflect on the executive's overall performance in a thoughtful, reflective, and professional manner.
- Part Three: ECW Board of Directors should identify if additional training or executive coaching is required to support the ED in building leadership skills and

competencies, as well as allocate internal or external resources to fulfill training or executive coaching needs.

Step	Why is it important?	How to achieve it?
<p><b>Step One:</b></p> <p><b>Establish ECW Standards</b></p>	<p>In establishing ECW standards, the expectations of the task standards and functional standards are identified by and agreed upon by all members of ECW Board of Directors.</p>	<p><b>First:</b> Establish Task Standards. ECW Board of Directors can draw upon three sources of evaluation for task standards: 1) ECW ED’s job description, 2) ECW organizational or leadership annual action plans, or 3) ECW organizational performance metrics.</p> <p><b>Second:</b> Establish functional standards (standards on how ECW, especially the Board, wants the ED to perform) by identifying leadership behaviors or leadership responsibilities required for the role. Please note, the leadership behaviors and responsibilities identified should match what is communicated in the ED’s job description. ECW Board of Directors can consider the four leadership behaviors of transformational leadership.</p>
<p><b>Step Two:</b></p> <p><b>Assess Performance Against Standards</b></p>	<p>With the identification of standards in step one, ECW Board of Directors can then compare the ED’s performance against those pre-determined standards.</p>	<p>Assess ED’s performance against the established standards that were identified in step one. It is highly recommended that during this step, input from key stakeholders is included to assess in the process of reviewing performance against standards. Feedback from key stakeholder groups could include, but is not limited to board members, staff members, volunteers, or any other individual that the ED works closely with on a regular basis.</p>
<p><b>Step Three:</b></p> <p><b>Plan for Future Performance</b></p>	<p>Establishment of formalized goals for the ED for a specific time frame.</p>	<p>ECW Board of Directors to identify performance goals for the next year or for a specific time frame. ECW Board of Directors to clearly communicate the goals to the ED through a written performance action plan. Performance goals of the ED should contribute to meeting organizational goals and be aligned with the established standards.</p>

Figure 15: Proposed Steps for Development of Performance Evaluation Framework



***Recommendation 4: Improve ECW's organizational structure by creating and sharing a comprehensive job description for the ED.***

Lack of role clarity, especially for top executive-level positions, can significantly contribute to leadership and governance challenges within an organization. Drucker (1990) asserts that a key step in helping organizations move towards organizational effectiveness and success, especially in the realms of leadership and governance, entails the clear identification of roles and responsibilities as they pertain to the board of directors and executive management. When roles and responsibilities of executive management are explicitly defined, communicated, and acknowledged, the organization's governance will be better equipped to support leadership accountability.

Our findings show that the ED does not have clearly defined roles and responsibilities. Without having written documentation that explicitly defines roles and responsibilities of the ED, the ECW Board of Directors has not been able to evaluate nor monitor the ED's performance regarding her contributions to goal attainment. Thus, our research team recommends that the ECW Board of Directors develop a clear and comprehensive ED job description. To support the process of developing a job description, our research team adapted a template from job description samples crafted by executive recruiters from the Moran Company (Moran, 2014). Figure 16 represents our proposed template for a new ED job description.



ECW Executive Director Position
Template for Developing the Job Description of the Executive Director
<i>Overview of the Position:</i> Include a paragraph that describes the role of the Executive Director. In addition to including a paragraph on the overview of the position and role of the Executive Director, indicate who the Executive Director will be reporting to.
<i>Responsibilities:</i> Clearly articulate the responsibilities of the Executive Director. When identifying the leadership responsibilities, be clear and explicit. Ensure that responsibilities are straightforward and all encompassing. For example, Moran (2014) presents the following themes that can serve as a starting point for discussion and identification: board governance, financial performance, organization mission and strategy, and organization operations.
<i>Competencies:</i> Identify the competencies required for this role. Some examples include but are not limited to leadership competencies, nonprofit management competencies, management competencies. It is also important to identify the soft skills that matter and are necessary for the role.
<i>Qualifications:</i> Determine the professional and academic qualifications required for the role.
<i>Special Demands:</i> Communicate the extraordinary conditions and special demands of the job.

Figure 16: Job Description Template

## Discussion

### Research Findings

The aforementioned research findings and recommendations are the result of months of collecting and analyzing data from organizational documents, conducting interviews, and having in-depth conversations with the ED. In early conversations with the ED where she stated that goal achievement was an issue, she could not clearly define what was preventing the organization from achieving its goals. Our research team worked to craft a clear problem of practice and reviewed pertinent literature to better understand how this phenomenon was studied in other contexts. Through utilizing the Nonprofit Organizational Model as our conceptual framework, our research questions were developed with a focus



on how leadership (specifically the ED) was supporting goal attainment, how goals are communicated and understood by the affiliate, and in what ways the organization was structured to support goal attainment. With these research questions in mind, our team conducted interviews and examined organizational documents which were later organized and coded into data points to support the findings stated in this paper. The three major findings, in relation to the research questions, were as follows:

- Many feel important ED roles are not being filled.
- The ED does not have clearly defined roles and responsibilities.
- An absence of goals has led to a lack of accountability.

These findings were supported by data from both the interviews and documents.

This data was also used to craft recommendations that may assist the organization in revising its organizational goals for clarity and accountability, as well as in establishing structures that will enable the achievement of those goals.

### *Limitations*

Despite collecting a significant amount of data from the sources that we targeted (interviews and documents) giving us confidence in our findings and recommendations, some limitations might impact the application of these recommendations more broadly. One of the most significant limitations of this study is the relatively small sample size. Due to the organization's small size, our research team was only able to conduct 11 interviews (1 hour each) with members of the board and department managers for ECW programs. Ultimately, it would have been beneficial to have a larger sample size to improve the generalizability of our findings. A larger sample size would have also enabled our research team to interview more volunteers and managers and perhaps even large donors or



representatives from the referral agencies, broadening our perspective of the organizational dynamics and operations as a whole.

Another potential limitation of this study is the potential for selection bias. The participants who were interviewed for this study were selected by the ED and referred to us only after the ED had engaged in an initial discussion with the participant. In allowing the ED to select these participants, it is possible that their answers could have been biased in some way. As a result of the COVID-19 pandemic hindering our research team from being on-site during the research process, our team's ability to prevent the ED from hand-selecting interview participants was limited. However, our data shows that the ED's selection of interview participants did not appear to influence the participants to speak favorably about the ED.

The possibility of selection bias was not the only negative outcome of the COVID-19 pandemic's impact on our research capabilities. Government restrictions during the 2020 pandemic posed additional limitations. These restrictions eliminated our ability to travel from Taiwan, Kuwait, and Maryland to the metropolitan city where the organization is located. This limitation meant we were unable to conduct in-person observations and interviews, having to alternatively rely on digital means like Zoom, Gmail, and WhatsApp. Conducting research digitally curbed our team's ability to participate in observations of the organization and staff, as well as to conduct other methods of data collection such as coding body language. Additional methods of observation may have led to further support of our findings. Despite these limitations, we were still able to complete the interviews as scheduled and the organization did supply us with ample internal documents for analysis.

#### *Future Studies*



For future studies on goal attainment, specifically on the questions of how goals are communicated and how leadership and infrastructure can support goal attainment, our team recommends additional data collection that includes the perspective of more stakeholders like board members, managers, and volunteers. Our study focused primarily on the ED at ECW, though goal attainment is rarely a simple issue originating from the inaction or inability of a singular person. For this reason, it may be worthwhile to explore the Board of Directors' role in goal attainment or the perspective of volunteers on their level of engagement with organizational goals. Lastly, it may be worthwhile to compare a variety of nonprofit organizations' structures, leadership roles, and communication strategies to better understand how other organizations have approached similar problems of practice in the past. The literature on goal attainment is vast, especially given the diverse contexts in which theories regarding goal attainment may be applied. Understanding how these theories are employed in nonprofits in real-world settings may help inform the applicability of this study's findings and recommendations to other organizations.

#### *Recommendations of priority*

From the recommendations, we hope ECW will prioritize the implementation of the following:

- Creating a comprehensive job description for the ED, and subsequently ensuring that job descriptions are available for all positions.
- Developing and conducting a performance evaluation for the ED.
- Revising existing goals and objectives to align with the S.M.A.R.T. goal writing method and identifying performance metrics.

The implementation of job descriptions, especially for the ED, will help to clarify roles and responsibilities, eliminating the potential for any misunderstandings that have



thus far prevented the organization from making progress towards its goals. As stated in Kusher and Poole (1996), while formalized organizational structures themselves are not the sole contributors or indicators of organizational success, understanding underlying structures and how position responsibilities interlink is important for demonstrating professionalism and increasing volunteer commitment in nonprofits. Our research team, therefore, recommends that ECW improves their communication efforts through clearly written and widely communicated job descriptions. Minimal resources are necessary for the adoption of this recommendation. In fleshing out the ED's job description, the organization is also taking the necessary steps to hold the ED accountable.

Additionally, because of the high turnover rate seen in leadership, taking immediate action to train the current ED in the areas most important to the organization's successful pursuit of its goals seems prudent. Bringing in another ED may not fix the underlying issues within the organization, and may even lead to further chaos and turmoil. Addressing the current issues with the ED through a thorough performance evaluation and appropriate training may better enable the organization to set up its ED for success. Training may also provide the ED with a clearer understanding of how to support volunteers and management as they work together towards goal achievement.

Furthermore, interview data from this study reveal feelings of misunderstanding among the staff and volunteers regarding organizational goals. The inability of ECW leadership to effectively communicate their goals to constituents has acted as a hindrance to the organization's ability to fulfill its mission. By setting and communicating S.M.A.R.T goals and objectives, the organization can clearly document and communicate what needs to be achieved, who should be involved, and how the organization will proceed in the



achievement of these goals. A clearer picture of what the organization wants to achieve may provide better direction to the ED and promote shared cognition within the organization.

While we find all of the recommendations to be important, the three recommendations above should serve as a starting point to move the organization closer to achieving its mission. Crafting new job descriptions and transitioning to the use of S.M.A.R.T. goals are both low-cost ways to bring about significant change within the organization. While training the ED is an investment of the organization's time and resources, not training her may cost even more in the long run. If the organization invests in initial training and does not see improvement, they may consider alternative options for the position. However, if the ED is removed, the replacement ED should still be trained to meet the requirements of the position. Without the proper training, the organization may continue to encounter many of the same struggles that they are experiencing with the current ED.

## Conclusion

Goal attainment in the nonprofit setting is not as clear as it may be in a corporate setting, where success is almost exclusively measured by financial gain. For nonprofit organizations, leadership and stakeholders are tasked with understanding how they best define success for their unique mission. Based on this understanding, they must also implement the necessary accountability measures and communication channels to achieve their goals. As the research and our findings demonstrate, each organization is different with varied internal and external environmental factors impacting its viability. However, each organization also has a responsibility to its stakeholders to thoroughly examine the factors that contribute to or undermine its success. It is the hope of our research team that



ECW will consider our recommendations and reflect on how they can be adapted and implemented for their organization. We hope that by implementing these recommendations, ECW can move closer to creating and supporting realistic goals for the long-term sustainability and success of not only the organization but also the women they serve.



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# Appendix A

## Nonprofit Organizational Model (Thompson, 2011)

Primary Elements	Importance	What it Includes
<b>Mission</b>	<p>The mission is the core of the organization because it is the guiding force, meaning that everything the organization seeks to do or does, must align to the mission.</p> <p>The mission is a primary recruitment and motivation tool for staff, board members, volunteers, and donors.</p>	<p>Mission includes:</p> <ul style="list-style-type: none"> <li>• Organization’s mission and vision statements.</li> <li>• Written values, goals, and strategies</li> </ul>
<b>Programs</b>	<p>The programs are the core of the organization and are closely aligned to the mission. Thus, it is also identified at the center of the model.</p> <p>Board members, staff, and volunteers become involved with the organization because of its programs.</p>	<p>All the programs of the organization.</p>
<b>Infrastructure</b>	<p>Infrastructure is the basic framework of the organization.</p> <p>Outlines formal decision-making processes and establishes boundaries of acceptable behavior.</p> <p>Determines how boards, people, departments, and programs are evaluated.</p>	<p>Infrastructure includes:</p> <ul style="list-style-type: none"> <li>• Formal Organizational charts</li> <li>• Bylaws</li> <li>• Policies and procedures</li> <li>• communication channels, and evaluation methods.</li> </ul>
<b>Leadership</b>	<p>The demonstrated leadership by all members of the organization. Leadership in the model is not attributed to board and executive management only, rather, every staff person fulfills an important role and has the potential to demonstrate leadership.</p> <p>Leadership includes the skill sets, and relationships amongst all the organization’s paid staff, board members, and volunteers.</p>	<p>Leadership includes:</p> <ul style="list-style-type: none"> <li>• Board</li> <li>• Individual board members</li> <li>• Executive management</li> <li>• Individual executive managers</li> <li>• Paid staff</li> <li>• Volunteers</li> </ul>



<p><b>Funding</b></p>	<p>Funding is a central element of nonprofit organizations and is often a limiting factor in an organization’s ability to expand programming and further its mission.</p> <p>Having diverse funding streams is essential to the health of a nonprofit organization because single source funding can often and does lead to closing of important programs.</p> <p>Establishing diverse and robust funding streams is essential to creating financially sound organizations.</p>	<p>Funding sources include:</p> <ul style="list-style-type: none"> <li>● Foundation grants</li> <li>● Personal donations</li> <li>● Special events</li> <li>● Earned income</li> </ul>
<p><b>Community Relationships</b></p>	<p>The relationship of the organization with its community through partnerships, collaborations, agreements, or formal agreements.</p> <p>Community accountability is required by the organization to remain accountable to funders, partners, and other community members.</p>	<p>Community relationships includes:</p> <ul style="list-style-type: none"> <li>● Community partnerships</li> <li>● Community accountability</li> <li>● Partnerships with other nonprofit organizations, for-profit businesses, government organizations, or individuals.</li> </ul>
<p><b>Marketing and Image</b></p>	<p>Through formal and informal aspects of advertising, the brand, reputation, and image of the nonprofit is created.</p> <p>There are unstated and unintended aspects of marketing and image creation that affect the reputation and brand of the organization.</p> <p>Supports with creating the buzz around the organization in the internal and external environments.</p>	<p>Marketing and image include:</p> <ul style="list-style-type: none"> <li>● Marketing plans</li> <li>● Marketing materials</li> <li>● Logo(s)</li> <li>● Media coverage</li> </ul>



<b>Community Relationships</b>	<p>The relationship of the organization with its community through partnerships, collaborations, agreements, or formal agreements.</p> <p>Community accountability is required by the organization to remain accountable to funders, partners, and other community members.</p>	<p>Community relationships includes:</p> <ul style="list-style-type: none"><li>• Community partnerships</li><li>• Community accountability</li><li>• Partnerships with other nonprofit organizations, for-profit businesses, government organizations, or individuals.</li></ul>
<b>Technology</b>	<p>Organization’s utilization of technology to support the operations of the organization.</p>	<p>Technology includes all the physical items allowing the organization to operate such as high-tech database systems, office desks, telephones, are considered as technology.</p>

Note: Adapted from “The Nonprofit Organizational Model: A New Model for Nonprofit Organizations” by C. Thompson, 2011, OD Practitioner, 43 (2), p. 34-36.  
[https://www.banyan-consulting.com/uploads/3/8/8/4/38842185/nonprofit\\_organizational\\_model\\_-\\_od\\_practitioner\\_article\\_2011.pdf](https://www.banyan-consulting.com/uploads/3/8/8/4/38842185/nonprofit_organizational_model_-_od_practitioner_article_2011.pdf)

## Appendix B

Source Type	Description	Theme	Code	Supporting Evidence
Annual Report 2019	Submitted by Director of Programs	Mission (Goals)	Sponsorship	<ul style="list-style-type: none"> <li>No fiscal sponsors</li> </ul>
			Programs	<ul style="list-style-type: none"> <li>Client services available 15 hours per week/3 days</li> <li>750 appointments for services for 2020/394 listed as being served in 2019</li> <li>Only served women in preparation programming, no other programs had listed clients served (6 programs listed with 0 clients)</li> <li>Question asking how many women fulfilled their goal after completing services has “respondent skipped this question” as response</li> <li>Questions for including data tracking of clients and achievements of their stated goals: “Respondent skipped this question”</li> </ul>
			Goals	<ul style="list-style-type: none"> <li>N/A</li> </ul>
	February 7th (Started) February 14th (Finished) Web-based	Leadership	Programs	<ul style="list-style-type: none"> <li>Led by ED- 3 events               <ul style="list-style-type: none"> <li>Event 1: Raised: \$100,000; Cost \$20,000</li> <li>Event 2: Raised: \$8,788; Cost: \$800</li> <li>Event 3: Raised: \$25,000; Cost: 1,000</li> </ul> </li> <li>Services offered: Facilitator-shows no clients; Counseling shows 30 clients (contradicts number previously referenced in document - 0); Networking- 0 clients</li> <li>Individuals who met goals established: 0</li> <li>Community outreach through mobilized efforts- “respondent skilled this question”</li> <li>Plan to start additional programs in 2020. No</li> </ul>
			Parent Company	<ul style="list-style-type: none"> <li>Assistance requested from the parent company. Notes show that the parent company sent a notable speaker to an event which helped to “elevate the reputation of” ECW. The parent company</li> </ul>



Source Type	Description	Theme	Code	Supporting Evidence
				representatives helped to connect this branch with a major sponsor, helped to improve PR campaign, implement technology systems, fundraising experts.
		<i>Infrastructure (Organizational Structure)</i>	<i>Board</i>	<ul style="list-style-type: none"> <li>• Board president contact</li> <li>• Advisory Board (2 individuals) No meetings in 2019</li> <li>• Advisory board- Top corporate Sponsors</li> <li>• Plan for expansion by Summer 2020</li> <li>• 12 members listed on board</li> <li>• Demographics (83% African American, 17 % Caucasian; 92 % female, 8 % male; 75% over 45, 25 % under 45 years old; Professions listed as Entrepreneurs, Executives, Attorneys</li> <li>• No referral agencies on board</li> <li>• No former clients on board</li> <li>• Get/Give policy (\$5,500)- 75% fulfilled; \$10,000 personally donated by board members.</li> </ul>
			<i>Staff Members</i>	<ul style="list-style-type: none"> <li>• Two staff members listed (Executive Director- paid, Director of Programs - unpaid)</li> <li>• Less than 8 staff members as reported</li> </ul>
			<i>Volunteers</i>	<ul style="list-style-type: none"> <li>• 100 Active Volunteers</li> <li>• 125 Total Volunteers</li> </ul>
			<i>Community</i>	<ul style="list-style-type: none"> <li>• 32 active referral agencies</li> <li>• 105 total referral agencies</li> <li>• Formal process for including agencies</li> </ul>

Source Type	Description	Theme	Code	Supporting Evidence
<b>May Board Meeting Presentation</b>	Updated June 8, 2020 (Google Drive)  PPT February 7th (Started)	<i>Infrastructure (Organizational Structure)</i>	<i>Agenda</i>	<ul style="list-style-type: none"> <li>• Topics of discussion and presenters (with titles)</li> <li>• 2019 Annual Report summary along with details on team which completed the report.</li> </ul>
			<i>Policies and Procedures</i>	<ul style="list-style-type: none"> <li>• Necessary manuals for operation (to be created- what it should include)</li> </ul>
			<i>Technology</i>	<ul style="list-style-type: none"> <li>• Software assets needed to move services online with quotes for the usage of these programs.</li> </ul>



Source Type	Description	Theme	Code	Supporting Evidence
	February 14th (Finished)			<ul style="list-style-type: none"> <li>• Training to be planned for volunteers and staff on technology use starting June 1, 2020</li> </ul>
	Web-based		<i>Staffing</i>	<ul style="list-style-type: none"> <li>• Recruited and trained 2 new coordinators (communications and fundraising)</li> </ul>
			<i>Programming</i>	<ul style="list-style-type: none"> <li>• Inventory of resources needed for programming</li> <li>• Grants being pursued in conjunction with partner organization to support future program needs</li> <li>• New program launched. PowerPoint gives an image and name of program but no description.</li> <li>• Virtual programming is detailed including resources which will be available.</li> <li>• Data provided for progress: 223 referral partners identified, 30 connected with, plan to contact an additional 127 partners</li> <li>• Shift in programming for the networking department.</li> </ul>
			<i>Goals</i>	<ul style="list-style-type: none"> <li>• Goals listed (support growth, build a network, mentor, advocate, identify opportunities, provide a space to talk). Calendar shifted to accommodate online meetings. Planned for one each month with a new theme.</li> <li>• Plan to relaunch all programming in Fall 2020.</li> </ul>
			<i>Leadership</i>	<ul style="list-style-type: none"> <li>• Outlined Social Media Campaign</li> <li>• Additional COVID-19 resources added to help clients virtually</li> <li>• Published applicable community events to be held in 2020 for clients (19 events- not sponsored by ECW)</li> <li>• Operational strategy presented by Executive director detailing organizations history (included time the organization has been in operation, location of organization,</li> </ul>



Source Type	Description	Theme	Code	Supporting Evidence
				<ul style="list-style-type: none"> <li>and highest year of fundraising \$250,000- year not specified)</li> <li>• 2019 hired the current executive director to “rebuild” the organization; revamped the board to increase “strength;” Held inaugural event, moved forward for plans to implement new programs</li> <li>• 2020 Goals listed (goals listed in past tense- include the four elements of the 2019 rebuild listed above). Also includes” Raised \$200,000; moved locations, developed additional sponsorship relationships, and started new program</li> <li>• Organizational chart published (all positions listed as filled, 2 paid staff positions listed - ED, Program Head)</li> </ul>
			<i>Outreach</i>	<ul style="list-style-type: none"> <li>• Details on pre-COVID plans and current plans. List of pre-COVID shows in person services with quotas for clients (60 per month). New plans remove quota, move to completely virtual platform, includes fundraising initiatives continuing for corporate, individual donors.</li> <li>• Current Budget (March-June) including changes due to COVID (Original cost \$14,850/ New Cost due to COVID changes \$18,430).</li> </ul>

Source Type	Description	Theme	Code	Supporting Evidence
<b>Organizational Website</b>	<p>Published by ECW Affiliate</p> <p>Last updated: 2020</p> <p>Webpage</p>	<i>Mission</i>	<i>Programming</i>	<ul style="list-style-type: none"> <li>• No specific goals or achievements listed to include clients served</li> <li>• No listed events from February 2020. Calendar continues through 2023. No events listed. Upcoming events are blank.</li> </ul>



Source Type	Description	Theme	Code	Supporting Evidence
				<ul style="list-style-type: none"> <li>• Searchable information on programming for the website. No data found.</li> <li>• No organizational structure is listed.</li> <li>• Links to news articles from a variety of sources (pop sugar, the muse, Duke University, etc.) regarding professional development and public speaking.</li> </ul>
			<i>Infrastructure</i>	<ul style="list-style-type: none"> <li>• N/A</li> </ul>
<b>Overview Card (ECW Affiliate) Preparation Program Sponsor Letter</b>	Published by ECW Affiliate (Google Drive)	<i>Mission</i>	<i>Programming</i>	<ul style="list-style-type: none"> <li>• Four areas of programming listed with summary on what is offered in each area</li> </ul>
	No date Provided by ECW 5/28/20		<i>Mission Statement</i>	<ul style="list-style-type: none"> <li>• History of Organization</li> <li>• Mission stated in full</li> <li>• No specific data included</li> </ul>
	Published by ECW affiliate	<i>Infrastructure (Organizational Structure)</i>	<i>Leadership Team</i>	<ul style="list-style-type: none"> <li>• General contact information (no contact names). Website included with social media tags and keywords.</li> </ul>
	Signed by board president and Executive Director No date/Submitted to April 9, 2020 (Google Drive)		<i>Mission</i>	<i>Programming</i>



Source Type	Description	Theme	Code	Supporting Evidence
				<p>(No numerical goals explicitly stated- no data regarding “strides”)</p> <ul style="list-style-type: none"> <li>• “Tremendous Impact on women in need, and our entire community” (No numerical statistics)</li> </ul>
			<i>Sponsorship</i>	<ul style="list-style-type: none"> <li>• Listed benefits of joining as a sponsor (public acknowledgement, membership material, exclusive events, swag bags)</li> </ul>
Corporate Sponsorship Packet	PowerPoint Modified June 12, 2021 (Google Drive) Published by affiliate	<i>Mission</i>	<i>Programming</i>	<ul style="list-style-type: none"> <li>• Mission, program details (3 included: preparation, networking, coaching); organization establishment date, “over 10,000 women” have been assisted</li> </ul>
			<i>Demographics</i>	<ul style="list-style-type: none"> <li>• Clientele data, volunteer training to meet diverse needs of clients, location of organization</li> </ul>
			<i>Sponsorship</i>	<ul style="list-style-type: none"> <li>• Benefits of partnership-sponsorships allow for the work of the organization to continue, stating that companies can expect (employee satisfaction, professional development, visibility, marketing opportunities).</li> <li>• Event sponsorship. Details what happens at the end - collaboration of women who are leaders in their industries coming together. Sponsorship tiers for this event listed (from \$2,500-\$25,000)</li> <li>• Slide 8: Opportunities beyond the event, including a subtext noting the fundraising</li> </ul>



Source Type	Description	Theme	Code	Supporting Evidence
				<p>committee is willing to work to meet the needs and requests of the sponsor</p> <ul style="list-style-type: none"> <li>• Slide 9: How to become a sponsor. Includes contact information, office information, mailing address, and tax ID number</li> <li>• Slide 10: Thank you slide with logo</li> </ul>
<p><b>Communications Committee Presentation</b></p>	<p>ECW affiliate publication (Google Drive)  Spring 2020</p>	<p><i>Mission</i></p>	<p><i>Programming</i></p>	<ul style="list-style-type: none"> <li>• Slide 1: logo/cover slide</li> <li>• Slide 2: Areas of service/programming (7 listed)</li> </ul>
			<p><i>Goals</i></p>	<ul style="list-style-type: none"> <li>• No numeric goals or SMART (specific, measurable, achievable, realistic, timely) listed.</li> </ul>
		<p><i>Infrastructure (Organizational Structure)</i></p>	<p><i>Job Roles and Descriptions</i></p>	<ul style="list-style-type: none"> <li>• Slide 3: Committee Infrastructure listed by job function/ volunteer included Coordinator/Director of programs listed at top, Advisor from Board (under), volunteers below that 5 volunteers in sublevel, 1 intern listed in the bottom tier.</li> <li>• Slide 4: Job descriptions (included for four volunteer roles. No description for coordinator, director of program, or intern). Descriptions include “update” “Coordinate” “Design” “Assist” “Collaborate” “Use”</li> </ul>



Source Type	Description	Theme	Code	Supporting Evidence
		<i>Leadership</i>	<i>Branding</i>	<ul style="list-style-type: none"> <li>• Slide 4: Sample calendar including: office hours, dates to send documents, orientation dates, donation dates, fundraising events</li> <li>• Slide 5: Systems to use for each job (Example: Social Media Coordinator- Social media networks such as Facebook, Instagram, LinkedIn, &amp; Twitter).</li> <li>• Slide 6: Correct Logos for Brand Marketing</li> <li>• Slide 7: Sample request form for new project. Form includes description, usage of brand, file type of proposal, title, date, time, key messages, sponsors, required resources, and logos to use.</li> <li>• Slide 8: Questions?</li> </ul>
<b>Coaching Process Documentation (Training)</b>	Updated May 22, 2020 (Google Drive)  PPT	<i>Infrastructure (Organizational Structure)</i>	<i>Job Description</i>	<ul style="list-style-type: none"> <li>• Job description for coach</li> <li>• Responsibilities (what resources, documents, programs they will be responsible for)</li> <li>• Overall goals for this position in relation to client (Include develop required documents, assist in accomplishment of client's goal, encourage client, communication)</li> </ul>
		<i>Mission (Goals)</i>	<i>Programming</i>	<ul style="list-style-type: none"> <li>• Requirements of Clients to pursue services</li> <li>• Knowledge of Slack Channel</li> </ul>



Source Type	Description	Theme	Code	Supporting Evidence
				<ul style="list-style-type: none"> <li>Running log of meeting and accomplishments</li> <li>Where to Start directions for new coaches</li> <li>Required tracking and documentation (not included in the annual report)</li> </ul>
<p><b>Program A Coach Training Presentation</b></p>	<p>Updated May 22, 2020 (Google Drive)  PPT</p>	<p><i>Infrastructure (Organizational Structure)</i></p>	<p><i>Job Description</i></p>	<ul style="list-style-type: none"> <li>Intro slide/Agenda</li> <li>Managers and coordinators in charge of coaching presented with titles and names</li> <li>Coach title and responsibilities included (Slide 7/8)</li> <li>Specific objectives for the coach to accomplish with client</li> <li>To do list included and required list of forms (hours/feedback)</li> <li>Time commitment listed with sample calendar (June- October with listed events/trainings/ meetings/office hours)</li> <li>Published process guide including goals, specifications, and exemplars for expected outcomes</li> <li>Website</li> <li>Workshops hosted (0 listed for 2019 in annual report)</li> <li>Slack Channel (examples of final products)</li> <li>Best practices for coaches (listed practices and strategies)</li> <li>Hour commitment (minimum 4 per month)</li> </ul>
			<p><i>Resources</i></p>	<ul style="list-style-type: none"> <li>Conduct Code</li> <li>Confidentiality agreement</li> </ul>



Source Type	Description	Theme	Code	Supporting Evidence
		<i>Mission</i>		<ul style="list-style-type: none"> <li>Relationships with clients outside of the organization discouraged</li> <li>All media inquiries to be directed to ED</li> </ul>
			<i>Mission Statement</i>	<ul style="list-style-type: none"> <li>Mission statement (the same from the parent company) listed in full along with how the mission is accomplished through 3 specific programs</li> </ul>
			<i>Policies and Procedures</i>	<ul style="list-style-type: none"> <li>N/A</li> </ul>
<b>Volunteer Program B Training</b>	Updated June 8, 2020 (Google Drive)  PPT	<i>Mission (Goals)</i>	<i>Objectives</i>	<ul style="list-style-type: none"> <li>Understand process, provide enhanced client experience, basics of the job, area of needs, implementation of techniques.</li> </ul>
			<i>Program</i>	<ul style="list-style-type: none"> <li>Visuals included as exemplar examples of work expected.</li> </ul>
		<i>Infrastructure (Organizational Structure)</i>	<i>Process</i>	<ul style="list-style-type: none"> <li>Procedures from beginning of referral through the offered service (The cycle was not included as it includes specific verbiage which may compromise the identity of the organization)</li> <li>Acronym model for providing enhanced experience</li> <li>Required intake forms</li> <li>Privacy and confidentiality policy</li> </ul>
			<i>Roles and Responsibilities</i>	<ul style="list-style-type: none"> <li>Role and listed responsibilities (7 job specific tasks)</li> <li>Schedule</li> </ul>



Source Type	Description	Theme	Code	Supporting Evidence
				<ul style="list-style-type: none"> <li>Necessary skill sets (with resources to build skills for volunteer)</li> </ul>
New Volunteer Orientation	Updated April 7, 2020 (Google Drive)  PDF Packet	Mission (Goals)	Mission	<ul style="list-style-type: none"> <li>Mission of parent organization listed</li> <li>3 programs offered by the affiliate summarized</li> <li>History of the organization and location of the organization.</li> </ul>
			Programming	<ul style="list-style-type: none"> <li>6 areas for volunteers to work in with role, hours of commitment, responsibilities, and scheduled events listed</li> <li>List of what the organization expects from the volunteer (commitment to hours, reliable, open communication, respect)</li> <li>List of what volunteers can expect from the organization (Flexibility, respect, opportunities, assignments based on interest, community impact)</li> <li>3 core commitments volunteers must make: Commit to the mission, commit to sharing your talents, commit time to org.</li> </ul>
		Infrastructure (Organizational Structure)	Roles and Responsibilities	<ul style="list-style-type: none"> <li>Areas of immediate need listed including: Advocates, facilitators, committee members, coordinators, and technology</li> <li>Hour commitment (minimum 4 per month)</li> <li>Conduct Code</li> <li>Confidentiality agreement</li> </ul>



Source Type	Description	Theme	Code	Supporting Evidence
				<ul style="list-style-type: none"> <li>Relationships with clients outside of the organization discouraged</li> <li>All media inquiries to be directed to ED</li> </ul>
			<i>Open Positions</i>	<ul style="list-style-type: none"> <li>N/A</li> </ul>
			<i>Policies and Procedures</i>	<ul style="list-style-type: none"> <li>N/A</li> </ul>
<b>Referral Program Documentation</b> <b>May Board Meeting Presentation</b>	Updated June 8, 2020 (Google Drive)  PPT Updated June 8, 2020 (Google Drive)  PPT	<i>Mission (Goals)</i>	<i>Programs</i>	<ul style="list-style-type: none"> <li>Noted pre-COVID programming and during COVID</li> <li>Shift in programs (no longer offering any in person services)</li> <li>All services are digital, or resources can be mailed when requested</li> <li>Process from Referral through counselor listed with summary of services</li> </ul>
		<i>Infrastructure (Organizational Structure)</i>	<i>Identity</i>	<ul style="list-style-type: none"> <li>Who are we?</li> <li>Listing as nonprofit.</li> <li>Mission included in identity</li> <li>Reputation for services to empower women</li> </ul>
		<i>Leadership</i>	<i>Networking</i>	<ul style="list-style-type: none"> <li>What the organization can offer referral agencies (network of partners, professional development)</li> <li>What the referral agency can offer the organization (Name recognition, support for programs, referral of clients, coordination, and collaboration)</li> </ul>
		<i>Infrastructure (Organizational Structure)</i>	<i>Agenda</i>	<ul style="list-style-type: none"> <li>Topics of discussion and presenters (with titles)</li> <li>2019 Annual Report summary along with</li> </ul>



Source Type	Description	Theme	Code	Supporting Evidence
				details on team which completed the report
			<i>Policies and Procedures</i>	<ul style="list-style-type: none"> <li>Necessary manuals for operation (to be created-what it should include)</li> <li>Software assets needed to move services online with quotes for the usage of these programs.</li> <li>Training to be planned for volunteers and staff on technology use starting June 1, 2020</li> </ul>
			<i>Staffing</i>	<ul style="list-style-type: none"> <li>Recruited and trained 2 new coordinators (communications and fundraising)</li> <li>Organizational chart published (all positions listed as filled, 2 paid staff positions listed - ED, Program Head)</li> </ul>
			<i>Technology</i>	<ul style="list-style-type: none"> <li>Inventory of resources needed for programming</li> <li>Grants being pursued in conjunction with partner organization to support future program needs</li> <li>New program launched. PowerPoint gives an image and name of program but no description.</li> <li>Virtual programming is detailed including resources which will be available.</li> </ul>
		<i>Mission (Goals)</i>	<i>Programming</i>	<ul style="list-style-type: none"> <li>Data provided for progress: 223 referral partners identified, 30 connected with, plan to contact an additional 127 partners</li> </ul>



Source Type	Description	Theme	Code	Supporting Evidence
				<ul style="list-style-type: none"> <li>• Shift in programming for the networking department. Goals listed (support growth, build a network, mentor, advocate, identify opportunities, provide a space to talk). Calendar shifted to accommodate online meetings. Planned for one each month with a new theme.</li> <li>• Plan to relaunch all programming in Fall 2020.</li> <li>• Additional Covid-19 resources added to help clients virtually</li> <li>• Published applicable community events to be held in 2020 for clients (19 events- not sponsored by ECW)</li> <li>• Operational strategy presented by Executive director detailing organizations history (included time the organization has been in operation, location of organization, and highest year of fundraising \$250,000- year not specified)</li> <li>• 2019 hired the current executive director to “rebuild” the organization; revamped the board to increase “strength;” Held inaugural event, moved forward for plans to implement new programs</li> <li>• 2020 Goals listed (goals listed in past tense-</li> </ul>



Source Type	Description	Theme	Code	Supporting Evidence
				<p>include the four elements of the 2019 rebuild listed above). Also includes” Raised \$200,000; moved locations, developed additional sponsorship relationships, and started new program</p> <ul style="list-style-type: none"> <li>• Current Budget (March-June) including changes due to COVID (Original cost \$14,850/ New Cost due to COVID changes \$18,430).</li> </ul>
		<i>Leadership</i>	<i>Outreach</i>	<ul style="list-style-type: none"> <li>• Details on pre-COVID plans and current plans. List of pre-COVID shows in person services with quotas for clients (60 per month). New plans remove quota, move to completely virtual platform, includes fundraising initiatives continuing for corporate, individual donors.</li> <li>• Outlined Social Media Campaign.</li> </ul>
<b>Internship Documents</b>	Updated January 24, 2020 (Google Drive)	<i>Mission (Goals)</i>	<i>Mission</i>	<ul style="list-style-type: none"> <li>• Mission of parent organization listed</li> <li>• 3 programs offered by the affiliate summarized</li> <li>• History of the organization and location of the organization.</li> </ul>
			<i>Programming</i>	<ul style="list-style-type: none"> <li>• Special Events and Workshops listed (not specific to interns/organization sponsored events)</li> </ul>
		<i>Infrastructure (Organizational Structure)</i>	<i>Roles and responsibilities</i>	<ul style="list-style-type: none"> <li>• Job duties and skills required (including specific completion of documents and interacting with clients)</li> </ul>



Source Type	Description	Theme	Code	Supporting Evidence
Marketing Calendar June-December 2020 (Published without COVID Corrections)	Updated July 6, 2020 (Google Drive)	<i>Mission (Goals)</i>	<i>Programs</i>	<ul style="list-style-type: none"> <li>Calendar June -December 2020</li> <li>June -August list meetings, events, workshops, update sessions, program reimplementation, trainings</li> <li>September-December are blank calendars</li> </ul>
Volunteer Handbook 2018	Updated July 6, 2020 (Google Drive)	<i>Infrastructure (Organizational Structure)</i>	<i>Policies and Procedures</i>	<ul style="list-style-type: none"> <li>Commitment of hours</li> <li>Conduct (Summarized-professional)</li> <li>Confidentiality Agreement (Summarized)</li> <li>Safe working environment promise (includes actions to take and who to report incidents to)</li> <li>Maintain professional relationships with clients</li> <li>Dress code (professional at events/business casual for in office)</li> <li>Media policy- all inquiries go to Executive Director</li> <li>Termination/Resignation policy</li> <li>Job description and responsibilities for each category of volunteer. Section includes passwords, directors for using technology, how to work with referrals (specific checklist), visuals for how to conduct services and how to maintain the office.</li> <li>Confidentiality included in packet</li> </ul>
			<i>Agreement</i>	<ul style="list-style-type: none"> <li>Commitment from staff (you are valued and respected)</li> </ul>



Source Type	Description	Theme	Code	Supporting Evidence
			<i>Commitment</i>	<ul style="list-style-type: none"><li>• Commitment from volunteer (believe in the mission, commit to sharing your talents and adhere to time commitments)</li></ul>
		<i>Mission</i>	<i>Mission</i>	<ul style="list-style-type: none"><li>• Mission of parent organization listed</li><li>• History of organization and reason for mission summarized</li></ul>