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# Program, partnership, and resource management: success principles for churches that have programmatically and financially successful nonprofit organizations

Charles Dorsey

Pepperdine University

Graduate School of Education and Psychology

# PROGRAM, PARTNERSHIP, AND RESOURCE MANAGEMENT: SUCCESS PRINCIPLES FOR CHURCHES THAT HAVE PROGRAMMATICALLY AND FINANCIALLY SUCCESSFUL NONPROFIT ORGANIZATIONS

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by

Charles Dorsey

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Farzin Madjidi, Ed.D – Dissertation Chairperson

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Charles Dorsey

under the guidance of a Faculty Committee and approved by its members, has been submitted to and accepted by the Graduate Faculty in partial fulfillment of the requirements for the degree of

DOCTOR OF EDUCATION

Doctoral Committee:

Farzin Madjidi, Ed.D., Chairperson

Lani Simpao Fraizer, Ed.D.

Gabriella Miramontes, Ed.D.

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# DEDICATION

To God be the Glory for the things God has done. Thank God for purpose, mercy, and grace. May this work be used to edify every leader God has chosen to change this world.

I dedicate this research study to a loving, supportive, gorgeous, and brilliant wife who took the risk of sharing her life with me before I ever decided to pursue this degree. Keshia, my sweetheart, I love you with every fiber of my being. Your unwavering support means the world to me. I pray you are proud and inspired by this work. We did it!

I dedicate this research to my unborn child(ren). Whether you read this or not, your last name has meaning. May this document be proof that excellence and innovation run through your veins.

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# VITA

**EDUCATION**

Pepperdine University — May 2016
Graduate School of Education and Psychology
Doctor of Education in Organizational Leadership

Claremont School of Theology
Master of Divinity — May 2010

University of California at Irvine
Bachelor of Arts, Anthropology — June 2006

**CERTIFICATIONS AND LICENSES**

Ordination
African Methodist Episcopal Church Board of Examiners — October 2012
Mantle Leadership Institute
University of Southern California — August 2007

**PROFESSIONAL EXPERIENCE**

Executive Director
COR Community Development Corporation — January 2014- Present

Youth and Young Adult Pastor
COR AME Church, Irvine CA — January 2007 - January 2014

University of La Verne, La Verne, CA — June 2014 – Present
Adjunct Professor

**MEMBERSHIPS AND COMMUNITY COALITIONS**

Alpha Phi Alpha Fraternity Incorporated — Fall 2003-Present
General Member

New Directions for Women, Costa Mesa, — Jan 2015- Present
Board Member

# ABSTRACT

Church affiliated Human Service Organizations (CAHSOs) are drastically understudied. Consequently, the experience of their executive leaders is understudied. Information on CAHSOs and the experience of their executive leaders is often blended into general faith-based organizational research. Yet, CAHSOs play a vital role in the United States and abroad. CAHSOs are responsible for the social welfare of millions of indigent people in suffering communities. These organizations provide housing to the homeless, food to the hungry, clothing to the naked, and educational programing to at-risk youth, among many other things. These organizations, however, only function because of the expertise and work of executive leaders.

This research study used the phenomenological qualitative research method to interview executive leaders in CAHSOs. The goal of this research was to determine the challenges executive leaders face within CAHSOs and the strategies they use to overcome these challenges while gauging their definitions of success and documenting the advice these executive leaders have for others in their field. The analysis revealed various challenges including lack of financial, human, and real estate resources; unqualified staff; stressful work expectations; and strained relationships. Their strategies included measuring successes, building external networks, and leveraging religious practices. Executive leaders defined themselves by organizational performance and money. They encouraged other executives to leverage general business practices while evaluating their motives for working as an executive leader within a CAHSO. Generally, the results of this research offer insight into the challenges and celebrations of executive leaders of CAHSOs.

*Keywords: Church Affiliated, Faith-based, nonprofit, executive leadership, organizational leadership, executive challenges, human service organization*

# Chapter 1: The Problem

It is easy to look at the history of faith-based nonprofit organizations and notice the name of an organization before the name of it's leader. Few people can name the leaders of well known faith-based nonprofit organizations like the Salvation Army or St. Jude Hospital. Some don't become exposed to the leader of great organizations until biographical movies are shown in major media markets. Movies like *Steve Jobs* (Bellew, Bush, Zuriff, & Boyle, 2015), *Lincoln* (King, Lupi, Skoll, & Spielberg, 2012), *Gandhi* (Stanley-Evans & Attenborough, 1982), *Selma* (Bower et al., 2014), *The Wolf of Wall Street* (Dimbort et al., 2013)*, The Social Network* (Brunetti, Chaffin, De Luca, Rudin, & Fincher 2010), and *American Gangster* (Costigan et al., 2007) tell stories of organizational leaders while giving insight to their practices, lifestyles, and even challenges as they demonstrated ambition and created vision. Notably, none of these movies documented the leadership of a faith-based nonprofit organization. Similarly, many scholars fail to engage in studies related to executive leaders in faith-based nonprofit organization. The same scarcity of research exists concerning church affiliated nonprofit organizations.

## Leadership

The conversation about executive leaders in faith-based and church affiliated human service organizations (CAHSOs) starts with a conversation about leaders and leadership. As a concept and practice, leadership has been well studied. Many authors have produced popular literature on the different philosophies of leadership and practices of great individual leaders (Cashman, 1998; Kouzes & Posner, 2012; Maxwell, 2007; Northouse, 2012). Other authors have attempted to articulate what leadership looks like within growing and thriving organizations (Collins, 2001; Robbins & Judge, 2013; Schein, 2006; Senge, 2006). According to Omran, Mahmood, and Hussin, (2008), “There can be little doubt that the well being and success of any nation or organization is heavily dependent on good and effective leadership” (p. 336). Since the study of leadership is saturated with opinions about what makes a leader and how that leader operates within organizations, it is important to document how general leadership research influences more specific leadership research about executive leaders of faith-based and CAHSOs.

**Executive Leaders**

Although it is helpful to understand leadership at a broad level, it is equally important to focus on the leaders that create visions and hold great organizational responsibility. In relation to schools, Harris, Brown, and Abbott (2006) clearly articulated the expectations of an executive leader:

> It is the responsibility of the executive leader, therefore, to manage the tensions between, on the one hand, the need for “rapid decision making” and, on the other, involving and consulting the staff as a whole. He or she needs to ensure that action is taking place and momentum is being built up. They also need to ensure that the executive leadership team, like any leadership team, can make its own mistakes in the initial period. This way it is more likely to generate a level of buy-in to self-evaluation and review. (p. 405)

Whereas the term *executive leader* is applied to various persons throughout any given organization, more significance is given to the Chief Executive Officer (CEO). Several articles document CEOs’ level of influence as essential to the success of organizations (Giberson et al., 2009; Hoefer, Watson, & Preble, 2013). They must be considered a primary source of information when looking at the experience of executive leaders of faith-based and CAHSOs.

**Human Service Organizations**

The understanding of executive leaders and leadership is influenced by the context in which that leadership occurs and that leader functions. According to Bolman and Deal (2013), people and the organization in which they work operate in a codependent relationship, each fulfilling the needs of the other. Therefore, understanding HSOs becomes an essential part of the narrative surrounding the study of executive leaders within these types of organizations. There are different types of HSOs; Ebaugh, Chafetz, and Pipes (2007) documented at least nine, including those that focus on civic issues, medical issues, and advocacy concerns. For the purposes of this study, the literature distinguishes between faith-based human service organizations (FBHSOs) and various other types of organizations being categorized as secular HSOs.

**Faith-Based (Church Affiliated) Human Service (Nonprofit) Organizations**

FBHSOs are often clumped into the acronym FBO (faith-based organization; Ebaugh et al., 2007; Graddy, 2006; Howell-Moroney, 2009; Jordan, 2008). According to Cnaan and Curtis (2013), the literature often mistakenly uses this designation to refer to various institutions that are associated with or founded on a particular religious or faith tradition, including church congregations. The literature also revealed various attempts to generate universal *faith-based* organization criteria. For example, Jeavons (2004) produced criteria for assessing an organization's *religiousness*. Sider and Unruh (2004) developed typologies to evaluate how much HSOs integrate faith into their operation and daily practices. These two seminal research articles offer evidence that the study of FBHSOs is still full of unanswered questions and scholarly inquiry or debate.

**FBOs and social services.** According to Belcher and Deforge (2007), “Faith-based Organizations (FBO) have for many centuries provided services to indigent people” (p. 2). Some continue to do so today. For example, for more than 150 years, the Salvation Army (n.d.) has been known for their global efforts toward combating poverty, homelessness, and natural disasters. Other organizations with a similar history include Food for the Poor (n.d.), St. Jude Children’s Research Hospital (2015), and Goodwill Industries International, Inc. (n.d.). Noticeably, the Salvation Army, Food for the Poor, St. Jude Children’s Hospital, and Goodwill exist as FBHSOs and articulate a history of impact through the lens of religious belief. Each one of their mission statements touts the work they do for needy populations. They have distinguished themselves as some of the top, successful, and most recognized FBHSOs in the world. Their distinguished reputations can also be attributed to the amount of charitable gifts they receive or raise annually (Barrett & Novack, 2015). However, their recognition is not accompanied by an analysis of what each organization’s executive leadership contributed to that success. Scholarly research also fails to deliver opinions about the role of leadership in these organizations.

**Executive leaders of FBHSOs.** The legacy and reality of FBOs participating in social service delivery is well documented (Chaves & Tsitsos, 2001; Cnaan, Sinha, & McGrew, 2004; Graddy & Ye, 2006; Kissane, 2008). However, the record of their leaders, their leaders’ actions, and their successes, or even failures, does not accompany this documentation. Literature about nonprofit organizations often describes organizations that are founded and led by nameless leaders whose excellent work is attributed to philanthropic passion for people who lack basic needs.

The missing information about executive leadership in faith-based nonprofits is demonstrated at the federal level. As Vidal (2001) noted, “In recent years, policymakers have begun looking to churches, synagogues, mosques, and other faith-based organizations to play a greater role in strengthening communities” (p. 1). Before the turn of the 21st century, Bill Clinton and his administrative leadership team proposed new federal rules to incentivize partnerships between secular federal or state support agencies and CAHSOs (Anderson, 2009; Chaves, 1999; Cnaan & Boddie, 2002). The G. W. Bush and Obama administrations reinforced support for these partnerships by establishing and maintaining the White House Office of Faith-based and Community Initiatives (Anderson, 2009).

These legislative incentives generated significant literary dialogue and called into question the influence, reputation, effectiveness, and social impact of faith-based (mostly churches) HSOs throughout the United States (Ferguson, Wu, Spruijt-Metz, & Dyrness, 2007; Kissane, 2008; K. Smith & Teasley, 2009). The question most commonly asked by scholars and critics revolved around the absence of empirical evidence to substantiate governmental inclination toward certain nonprofit organizations over others. The importance of knowing the impact of an investment cannot be understated and deserves to continue being researched. However, the majority of research on federal resources and FBHSOs fails to consider the relevance of leadership in all such organizations. The literature also fails to distinguish CAHSOs and their leaders within the broad range of faith-based nonprofit organization research. Seemingly, there is an absence of consideration or an assumption of competence when it comes to leaders of faith-based nonprofits and CAHSOs alike.

**Problem Statement**

The significance of CAHSOs should not be eclipsed under the banner of faith-based nonprofit organizations. The social, economic, or community impact of CAHSOs cannot be attributed exclusively to their names, reputations, or missions. Rather, the social, economic, and community impact of CAHSOs can be attributed to the decisions, skills, legacy, and management style of executive leadership. Even their challenges deserve literary consideration.

Current literature identifies the strategy and brilliance of executive leadership specifically in CAHSOs as secondary, inconsequential, or peripheral. The deficiency of literature exploring the attributes and outcomes of CAHSOs perpetuates the neglect of leadership. Consequently, the task of executive leadership in CAHSOs goes unacknowledged, overlooked, or disguised in conversation with other faith-based nonprofit organizations. The lessons on success and failure remain hidden in the minds and experience of generations of executive leaders. Silos form and questions persist regarding the *how to* of CAHSOs. The mystery and methodology of CAHSO executive leaders remains camouflaged in general executive leadership literature. This literary oversight inevitably positions the executive leadership of present and future CAHSOs to endure ambiguity and hardship.

**Purpose Statement**

Accordingly, the purpose of this study was to determine the challenges that executive leaders face in CAHSOs, the strategies and practices they use to address these challenges, and how these leaders track the success of the solutions they implement. This study also determined what advice executive leaders would give to emerging leaders who work for CAHSOs.

**Research Questions**

1. What challenges do executive leaders in church affiliated human service organizations face?
2. What strategies have executive leaders in church affiliated human service organizations devised to overcome these challenges?
3. How do executive leaders in church affiliated human service organizations know if their strategies and practices are effective?
4. What recommendations would church affiliated human service organization executive leaders make to professionals in the field?

**Significance of Study**

CAHSOs and the experience of their executive leaders present a great opportunity for exploration. This study will serve as a source of information and confidence for executive leaders of CAHSOs. It sought to create a narrative that leads to an executive leadership model for CAHSOs. It will spark opportunities to build community and develop training seminars that are specific to the needs of executive leaders in CAHSOs.

For some CAHSOs, the results of this study will serve as a revelation. Executive leaders in CAHSOs must understand how the larger society views them. As federally acknowledged, positively reputed organizations, CAHSOs have a tremendous opportunity to thrive. Fewer executive leaders of CAHSOs should suffer from lack of financial resources. Many executive leaders leave the field within 5 years, and many organizations forsake their missions and passions to simply keep the doors open. This should not be the case.

The bigger impact of this study is its contribution to serving the needs of more indigent communities. This study has the potential to encourage more concentrated efforts in CAHSOs due to the narrative executive leaders will learn to create. It also has the potential to create better leaders who will operate and work to create better organizations. This will ultimately help many CAHSOs to realize the reality of the reputation that prompted federal government to secure and set aside funds for partnership.

**Limitations of Study**

The limitations of this study are as follows:

- The nature of qualitative research includes the possibility of various interpretations. “Unquestionably, the backbone of qualitative research is extensive collection of data, typically from multiple sources of information” (Creswell, 2013, p. 52). Consequently, it is possible that the conclusions of this study may not reflect the experience of the majority of persons who experience the same phenomena.
- “The value of qualitative studies has often been overlooked in favor of quantitative studies, which are generally thought to be more objective and thorough” (Vishnevsky & Beanlands, 2004, p. 234). Since CAHSOs have not been studied extensively, the information gathered might be interpreted as questionable due to the lack of quantitative studies in the field.
- The researcher had no way of confirming the honesty and integrity of the information given by the research participants.
- The sample size was limited to fewer than 20 participants. Purposeful sampling was employed to ensure diversity; however, the newness of the field could influence results.
- Transcription documents usually do not record body language or tonality. Consequently, the research project might lack accurate contextual understanding.

- The race, physical appearance, and religious tradition of the researcher might have influenced the research participants' responses. The success of any qualitative research is highly dependent on the researcher's capability and ability to set aside any preconceptions and biases. Although every precaution was taken to guard against bias and to capitalize on the ability of the researcher to perform objective analysis, it is possible that preconceptions or bias could have unintentionally impacted the findings.
- Predetermined interview questions focused on the research participants' challenges, which may have eclipsed information about the best practices, unique strategies, and explicit underlying success practices.
- Only CAHSOs in the United States were considered for participation.
- The participants' ages might have influenced their responses.
- The religious traditions of the research participants might have influenced their responses.
- The researcher assumed the participants' religion based on the organization in which they were involved. However, religious belief itself was not being studied.
- There is no consensus on the definition of a CAHSO, so there may be a gap in the perspectives that may not be identified until more research is done in the field.
- In simple terms, qualitative research is a "way of knowing" perspective (Vishnevsky & Beanlands, 2004, p. 234) and learning about different experiences from the individual's. The definition, role, and authority of the executive leader differ for every participant. Consequently, these differences may be revealed in research results.

**Definition of Terms**

- **Church affiliated human service organization (CAHSO)** – Any HSO that is connected directly or indirectly to a Christian church or denomination or that embodies the beliefs and traditions of any well-known Christian church or organization.
- **Faith-based organization (FBO)** – “The term ‘faith-based’ has become widely used, but not embraced with universal enthusiasm” (Vidal, 2001, p. 2). Consequently, for the purposes of this study, a FBO is any nonprofit organization affiliated with or based in a religious tradition or facility. This term must be distinguished from *church affiliated* because it is broad ranging and covers the broad range of religions, religious organizations, and religious affiliated groups that exist in the United States. It is important to note that the number of faith-based organizations in the United States is estimated to be more than 12,000 (Hartford Institute for Religious Research, n.d.).
- **Community Development Corporation (CDC)** – A not-for-profit organization incorporated to provide programs, offer services, and engage in other activities that promote and support community development. CDCs usually serve a geographic location such as a neighborhood or a town. They often focus on serving lower-income residents or struggling neighborhoods. They can be involved in a variety of activities including economic development, education, community organizing, and real estate development. These organizations are often associated with the development of affordable housing (“Community Development Corporation,” 2015).
- **Human Services** – “‘Human services’ is defined here as social services designed to meet human needs that are required for maintaining or promoting the overall quality

of life of the prospective service populations" (Zins, 2001, pp. 6-7). The organization's mission, resource specialty, method of delivery, and client base are important features that serve as criteria for assessing services that fall into this category.

- **Human Service Organizations (HSOs)** – Any organization that offers social, economic, and basic needs relief to communities in need. HSOs include, but are not limited to, Community Development Corporations, churches, nonprofit organizations, HSOs, and social service organizations. All of these organizations must possess nonprofit status and be bound by the federal expectations therein.
- **Social Services** – A range of public services provided by governmental or private organizations. These public services aim to create more effective organizations, build stronger communities, and promote equity and opportunity. Social services include benefits and facilities such as education, food subsidies, healthcare, job training and subsidized housing, adoption, community management, policy research, and lobbying ("Social Services," 2015).

**Summary**

This chapter introduced the significance and history of executive leaders in CAHSOs in providing social services to indigent communities and the fact that their experiences have largely gone unrecognized in the literature. In order to articulate the significance of this leadership issue, executive leaders, faith-based HSOs, and executive leaders in FBHSOs were discussed briefly. The absence of literature on this topic makes it difficult to sustain and reproduce FBHSOs or CAHSOs, enabling them to continue offering social services. This is the case despite the effort of the federal government to leverage the infrastructure of faith-based and CAHSOs in delivering social services to impoverished and needy populations in the United States. Therefore, the purpose of this study was to give voice to executive leadership in CAHSOs. This chapter introduced the research questions that served to accomplish this task and included individuals who would find the results valuable, the limitations of this study, the assumptions, and a definition of terms.

The assumptions in Chapter 1 deal with general ideas that surround the way faith-based and/or church affiliated organizations run, from a moral, theological, philosophical, or values-based perspective. Furthermore, this area of research has yet to be explored. Consequently, the results only depict a small portion of the experiences in this field. Other limitations include the criteria for the CAHSOs whose leaders took part in this study. This study did not choose successful, culturally based, or data based organizations, nor did the study choose CAHSOs due to their financial status or rapport in the communities they serve.

This chapter addressed the importance of competent and emerging leadership in CAHSOs that deliver much-needed social services in the United States. The purpose of this study was to poll 15 executive leaders at CAHSOs about their challenges, their response to challenges, their assessment of their response to the challenges, and the advice they have for others in the field. Specifically, the results of this study will be helpful for current and future executive leaders of CAHSOs. From a more general perspective, FBOs, Christian church leaders, and nonprofit executive leaders will benefit from this information.

# Chapter 2: Literature Review

## Leadership

If one could select a single word to describe the field of leadership research, an appropriate choice would be *saturated*. Leadership is a field of study with thousands of years of material and examples in the pool of consideration (Hussain & Hassan, 2015). Bolman and Deal (2013) begin their conversation about leadership broadly referencing ancient stories of kings, warriors, and government heads who bring order to a region against opposition while simultaneously garnering great influence and eventually falling victim to corruption themselves. This cycle of leadership made up the bulk of information before the late 19th century introduced large and sophisticated organizations, prompting interest in how some organizations achieve success above others.

While discussing theories of leadership, Kumar, Adhish, and Deoki (2014) mentioned the significant increase in published leadership literature since the late 20th century, describing the increase as an explosion. An intentional Google search for the word leadership in February of 2016 displayed 461 million links in .39 seconds. It also revealed 259 million links for the phrase *definition of leadership*. These realities paint a picture of the study of leadership that includes many voices, opinions, applications, and stories.

Leadership has been explored on the most basic levels through simple dictionary descriptions. For example, the New Oxford Dictionary ("Leadership," 2014) defines leadership using only 11 words. Some authors have created well-known leadership literature meant to express evidence-based organizational leadership practices (Kouzes & Posner, 2012; Maxwell, 2007; Schein, 2006; Senge, 2006). Other authors have created well-known leadership literature meant to express evidence-based personal leadership practices (Bryant, 2009; Cashman, 1998;

Jones, 2001). Each of these authors has attempted to simplify leadership into practical feasible steps or goals. Their books continue to evolve into later editions, large organizational lecture opportunities, and topics for study in leadership-specific coursework.

The term *leadership* has also been explored on a more specific level. Bolman and Deal's (2013) review of the literature led them to split their findings into *quantitative-analytic* and *qualitative-holistic* categories. For them, quantitative and qualitative research document the attempt to discover universal traits of a good leader, leading to five conclusions about the idea of leadership:

- Leadership is an activity, not a position.
- Leadership is different from management.
- Leadership is multilateral, not unilateral.
- Leadership is distributed rather than concentrated at the top.
- Leadership is contextual and situated not in the leader but in the exchange between leader and constituents.

According to Bolman and Deal, these five conclusions represent the synopsis of more than 100 years of leadership research literature. They use these conclusions as the foundation to offer a description of four types of leaders in organizations, why they succeed, and why they fail.

**Leadership approaches and styles.** Leadership literature typically focuses on different styles or approaches. Northouse (2012) is well known for cataloguing leadership theories and approaches historically and chronologically. In his book, *Leadership: Theory and Practice,* now in its sixth edition, Northouse discusses earlier theories that look at preferred traits of a leader as a means of assessing effectiveness and organization fit. He then moves into approaches of leadership that analyze relationships between the leader and the follower. He concludes his book discussing contextual influences like gender, culture, and the psychological aspects of leadership. Supplemental materials like DVDs, worksheets, websites, and online videos now accompany his book. Northouse serves as a reference point for many studies on leadership style and theory (Chin, 2010; Kim, Ko, & Kim, 2015; Lynch, 2015; Mary, 2005; McCarthy, 2014).

**Effective leaders.** The traits of effective leaders, their behavior, and the preferences of those that work with or follow them are well documented. “Books writing about [leadership] are almost certain to be best sellers” (H. White, 1990, p. 51). “It appears that having certain personality traits is associated with being an effective leader” (Northouse, 2012, p. 22). For example, Kouzes and Posner’s (2012) *The Leadership Challenge,* now in its 25th anniversary edition, became very popular for its research on the traits of an effective leader. From a more international perspective, the GLOBE Research team (House et al., 2004) documented the results of a study of 62 different countries seeking to discover the definition of effective leader across various cultures. John Maxwell has sold more than 20 million books and built a thriving organization teaching traits and behaviors of effective leaders (“John Maxwell,” 2015). Northouse (2012) has discussed several ways to evaluate an effective leader through the lens of different leadership styles and approaches. It seems quantitative research continues to reign in terms of its ability to provide the most reliable data about effective leaders.

Effective leadership literature is also discovered within organizational leadership literature. In his popular book on organizational leadership, *The Fifth Discipline,* Peter Senge (2006) discussed how learning organizations will succeed above others and how learning leaders are the key to those organizations’ success. Edgar Schein (2006) dedicated the final eight chapters of his book, *Organizational Culture and Leadership,* to discuss effective leadership practices as it relates to the culture of organizations. Bolman and Deal (2013), while analyzing the anatomy of organizations, blend effective leadership practices into their record. Robbins and Judges's (2013) book on organizational behavior also discusses the practices of an effective leader. From these books emerge other literature that uses similar frameworks to produce empirical evidence that adds to the archive of opinions surrounding effective leadership traits, behaviors, and perceptions.

The literature offers a consensus surrounding some key leadership traits. Domnica (2012), Reynolds and Warfield (2010), and S. White (2005) all agree that effective leaders prioritize vision and innovation, leaving implementation to others in the organization. For Omran et al. (2009), effective leaders have abundant knowledge, the ability to plan, and good communication skills. Kouzes and Posner (2012) concluded that effective leaders are truth-centered, future oriented, motivational, and capable. The analysis of effective leadership traits in various contexts continues to spark new questions and inspire more research.

**Definition of leadership.** The literature introduces opinions about the simplicity or complexity of defining leadership. "While many have a gut-level grasp of what leadership is, putting a definition to the term has proved to be a challenging endeavor for scholars and practitioners alike" (Northouse, 2012, p. 2). Both Hussain and Hassan (2015) and Kumar et al. (2014) have described leadership as a *science*, beyond an identified behavior. They described leadership as a learned skill of leading a group to a common goal. Beck (2004) defined leadership as *ever-changing* and subject to geography or context. Using more sophisticated imagery and language, Beck described leadership as "the preferred label for the contemporary, large-scale, global, technocratic world, the world of the uniculture, the universal guide to human interaction between any one and anyone, anywhere and everywhere" (p. 26). Northouse (2012) identified process, influence, groups, and common goals as the components of leadership that are common throughout literature. Consequently, he defined leadership as “a process whereby an individual influences a group of individuals to achieve a common goal” (p. 3).

Kessler (2013) endeavored to define leadership for people who serve within a Christian church. By creating a distinction between secular and non-secular leadership culture, Kessler introduced a different perspective to scholarly literature that attempts to define leadership. He discussed the struggle and complexity of defining “pure Biblical leadership” (p. 1), devoid of any cultural or secular principles. For him, it is impossible to separate leadership practices from the culture in which they exist. Consequently, the task of developing pure leadership models, particularly Biblical leadership, only wastes time. Kessler (2013) does not mention additional complexities or influences that religious tradition introduces to nonreligious leadership conversations. Additionally, Gibson and McDaniel (2010) discussed the need for a cross-cultural approach to understanding leadership theories, stating, “Members of different cultures who do not share a common way of interpreting and evaluating situational events are more likely to respond in different ways” (p. 450). The definitions, metaphors, religious considerations, and cultural implications that the literature introduces create a highly complex, nuanced picture of leadership.

**Leaders and managers.** Several authors make a distinction between being a leader and being a manager (Bolman & Deal, 2013; Domnica, 2012; Northouse, 2012; Omran et al., 2009; Stanley, 2006). However, the distinction is not always clear. As mentioned previously, the popular GLOBE research team surveyed managers in 62 countries to define the ideal traits of a leader. This study identified and surveyed managers about leadership traits. These leadership traits could likely show up in a person who carries a management title, which possibly reinforces the lack of clarity about being a leader or a manager. Bolman and Deal (2013) addressed the lack of clear distinction between being a leader and a manager explicitly as they unpacked the history and concept of leadership in the initial parts of their book. In an article about Malaysian leadership, Omran et al. (2009) examined how to communicate effective leadership qualities to project managers. For them, an effective manager has to possess certain leadership characteristics. Their article speaks about the tools or skills that help to “differentiate between project managers who are leaders and those who are managers” (p. 337). In an article that documents the pursuit of ideal leadership characteristic in African managers, Lee (2011) offered another example of the sometimes-blurred distinction between leaders and managers. Both of these articles, along with others, confirm the notion that the distinction between a leader and a manager is not always clear.

However, other authors are very clear about the distinction between the two. Domnica (2012) wrote an entire article with the goal of distinguishing the role/function of a manager from the role/function of a leader. Reynolds and Warfield (2010) produced a similar article while directing their attention to educational leadership in schools. According to Reynolds and Warfield:

> Schools have traditionally been full of quality managers but desperately short of leaders. “Leadership” and “management” are terms often used interchangeably in meaning and application. However, this is simply not the case. By definition and in practice, leadership and management are different functions requiring different skill sets. In short, managers have subordinates, while leaders have followers. (p. 62)

Stanley (2006) offered a similar position; however, he framed his argument in the context of nurses and the field of healthcare. His article cautions organizations, healthcare organizations specifically, that interchangeably apply the terms “manager” and “leader” trying to blend them into one position or person. In his findings, employees expressed difficulty trying to operate and perform as both leaders and managers. Stanley also shared the statements of employees who expressed a preference for the role of a leader so they would not have to deal with the some of the complexities of management like hiring and salaries.

Some articles that discuss management and leadership seem to imply the inseparable relationship or partnership between leaders and managers while maintaining that the concepts have different definitions or functions. Indeed, as Domnica (2012) noted, "Leadership and management are two distinctive and complementary systems to work with people in an organizational context" (p. 155). Furthermore, Stanley (2006) asserted, "Leaders focus on people and meaning but managers, while they like to work with people, tend to maintain low levels of 'emotional' involvement and can refrain from assuming that the meaning of events can be understood" (p. 32). Finally, H. White (1990) said, "Leaders need managers to make their vision work. Managers do the donkey work" (p. 52). Certainly, the leader/manager literature is a relevant part of the history of research in the leadership field.

Table 1

*Tasks Associated with Management and Leadership*

| Tasks | Management | Leadership |
|---|---|---|
| Create Agenda | Establishing a plan and setting a budget. | Articulating Vision and Direction |
| Achieve Agenda | Organizing and staffing | Aligning People |
| Execution | Controlling and Problem Solving | Motivating and Inspiring |
| Outcomes | Produces a degree of predictability and order | Produces change |

*Note.* Adapted from *A Force for Change: How Leadership Differs from Management* (p. 6), by J. P. Kotter, 1990, New York, NY: Free Press. Copyright 1990 by the author.

Kotter (1990) also shared his opinion about the distinction between managers and leaders. He referred to leadership as an ageless topic compared to relatively recent literature on management. He conducted a thorough comparison, shown in Table 1, listing the difference between how leaders and managers respond to certain tasks.

**Leader and follower relationship.** General definitions of a leader and follower place these two roles on different levels of an organization or describe one as answerable or subordinate to the other. The dictionary defines a follower as " someone who supports and is guided by another person or by a group, religion, etc." ("Follower," n.d., para. 1) and a leader as "a person who has commanding authority or influence" ("Leader," n.d., para. 2). Where the follower exists in organizational structure and his/her responsibility to that structure is often stated implicitly (Kean & Haycock-Stuart, 2011; Kearney, 2008; Monzani, Ripoll, & Peiró, 2014).

Hotep (2010), however, suggested a more egalitarian relationship between the leader and the follower, offering leadership definitions that were born in Ancient Egypt. His concept of African Centered Leadership-Followership, where the leader and follower operate as co-contributors, stands in opposition to Western hierarchical leader-follower relationships, where the leader is superior to the follower. According to Hotep, "Western hierarchical leadership relationships have trumped the potential of African Americans in the United States and the motive of teaching ACL-F, strategically taught through a school he created, is to restore it" (p. 13). While this theory is geared toward the African American community, it also offers a critique of educational institutions that perpetuate low achievement among students, particularly students of color. These examples of leadership definitions offer a brief glimpse into the diverse explanations of leadership.

**Diversity in leadership.** Both Ayman and Korabik (2010) and Chin (2010) made a strong case that culture, gender, and issues of diversity are marginalized in leadership literature. Even Bolman and Deal (2013) used only 20 of 526 pages to address/mention gender, diversity, and leadership. Generally applied concepts occupy the bulk of leadership research, whereas significant issues of geography, context, ethnicity, and gender are minimized. Aktas, Gelfand, and Hanges (2015) discussed the limited research that exists about the cultural aspects of leadership. Minimization and limited research have led to negative results in some cases. For example, a study in India attempting to implement transformational leadership practices was not well received by local management staff in comparison to its implementation in the United States. “This is because there are cultural differences in the way the components of transformational leadership are manifested in behavior” (Singh & Krishnan, 2007, p. 221). More specifically, transformational leadership encouraged individualism when the culture was more receptive to duty-oriented messages. This is one example of how overlooking factors like culture can lead to wrongful applications of leadership methods.

The literature has introduced research on diversity in leadership and its impact on leadership practices. Brown (2005) addressed the need for diversification in American K-12 schools where the population of students of color continues to increase. He suggested that more literature must address diversification in American K-12 school leadership as part of the process that prepares K-12 leaders to make adjustments as the population demands. As mentioned earlier, Hotep (2010) proposed a leadership model emerging from the African-Centered Leadership-Fellowship Conference. His leadership model includes Kemet (ancient Egyptian) principles while combining the often-rivaled philosophies of W. E. B. Dubois and Booker T. Washington. Gibson and McDaniel (2010) suggested considering specific and cross-cultural implications of leadership practice. Lastly, Dahlvig and Longman (2014) introduced the notion of a glass ceiling as it relates to women in leadership in Christian organizations. Each of these articles discusses deficiencies in leadership practices with respect to various areas of diversity.

Leadership is a term that cannot be taken for granted. It has survived many historical iterations that still influence current leadership thought while simultaneously creating criteria for which leadership definitions are credible or acceptable today (Grogan, 2005). It is important to appreciate the journey that scholars continue to travel in researching leadership, while simultaneously discovering hidden leadership terrain the journey has yet to cover.

## Executive Leaders

**Titles and positions.** Executive leaders exist under numerous titles, all of which operate under the oversight of the CEO. Some of these positions include Chief Financial Officer (CFO), Chief Operating Officer (COO), Chief Information Officer (CIO), Chief Technology Officer (CTO), General Counsel, Chief Revenue Officer, and other positions on the executive management team ("List of Corporate Titles," 2015). Each of these executive titles is accompanied by separate responsibilities and challenges (Marder, 2006)

Executive leaders are responsible for making the organization run. What is required of executive leaders depends on the organization that hired them. For Stephen Long (2009), executive leaders must possess intangible influence, which he calls *presence*; leaders move through a series of credibility building exercises to gain executive presence. He described presence as one of the keys to being viewed or received as an effective executive leader. Carrasco (2010) echoed Long's ideas, adding the importance of executive leaders intentionally assessing their impact, understanding their board, and delegating tasks. For Duta (2011), executive leaders must consider two different models of leadership that dictate their relationships with board members versus other leaders in the organization.

Some organizations expect executive leaders to focus on external and internal factors that determine their survival (Heimovics, Herman, & Jurkiewicz-Coughlin, 1993; Jurkiewicz & Massey, 1998). In other organizations, what is expected of executive leaders is often influenced by the amount of salary they receive (Gibelman, 2000). As Cashman (1998) noted, “Leaders at all levels of the organization are being challenged to perform like no other time in business history” (p. 101). Generally, executive leaders experience great pressure to ensure their organizations’ success, and the literature makes this point in several ways.

**Chief Executive Officer (CEO).** The CEO represents the top of the organization, functioning as the leader of the executive team. The CEO is a position filled by a person who was selected and endorsed by a board of directors, investors, or shareholders (Fram, 2011; Khurana, 2001; J. Smith, 1994; Perry & Preston, 2011). The CEO serves as the bridge between the shareholders and the executive team. This leader receives the expectations of the board and makes them clear to the executive team. By understanding the CEO, in most situations, one learns a great deal about the vision, values, and function of the organization (Hoefer et al., 2013).

Various articles have embraced the task of trying to profile the ideal CEO or leader of a company or organization. Martelli and Abels (2010) documented the educational profiles of top executives in fortune 500 companies. Their research explored the educational attainment of CEOs in the 1970s in comparison to those working today. They discovered that CEOs are more educated than they were during the 1970s, with many possessing degrees in business and liberal arts. However, their study did not discount those CEOs who only graduated high school or those who did not graduate high school at all.

Other articles discuss the challenges of being a CEO. In an address, PepsiCo Chairman and CEO Indra Nooyi (2010) discussed the challenges working as a CEO. She distinguished between being asked to create short-term successes while also maintaining long-term plans. This article offers an example of one CEO's experience. Sarros and Sarros (2011) documented the challenges of a CEO over 5 years of leading a school. CEOs are given platforms to discuss their success and challenges.

CEOs are given great attention in the literature due to their ability to influence the success or failure of their respective organizations. Some would argue that the state of the organization is often dictated by the state of its leadership. Giberson et al. (2009) linked the personality traits of the CEO with the values of the employees in an organization. After surveying 32 CEOs and 467 employees, they found great similarity between the personality traits of the CEO and the values of the organization or those that work for the organization. Therefore, many organizations take on the character and values of the CEO. Every executive position is important to the operation of the organization; however, the CEO continues to function as the essential person in the equation.

**Executive Leaders of HSOs**

Most nonprofit organizations have similar organizational structures that depend on the competence of executive leadership. Duta (2011) has directly attributed the success or failure in HSOs to two positions: the Executive Director and Board Chair. Jurkiewicz and Massey (1998) place the responsibility for decision-making, market research/forecasting, resource management, brand value, and organizational leading on top executives in HSOs. Kaiser, Craig, Overfield, and

Yarborough (2011) addressed the challenges that executive leaders face in comparison to middle management and supervisory positions "At lower levels, supervisors typically learn the consequences of their actions within days or weeks. Top executives, however, may not discover the effects of their decisions until decades later (p. 80)." Executive leaders are judged by the way they respond to the issues that challenge their competence and threaten their ability to keep their job (Heimovics et al., 1993). Seemingly the impact of the decisions of executive leaders carries great implications for their tenure and the future of the organization.

**Fundraising responsibility.** Executive leaders in HSOs are expected to build relationships and raise capital. For example, the Salvation Army (n.d.), more than 150 years since its founding, reportedly boasts more than $4 billion in annual revenue while continuing to be known for its global efforts toward combating poverty, homelessness, and natural disasters. Food for the Poor (n.d.) builds houses, provides water, and ships life-sustaining supplies to countries throughout the world, while producing nearly $1 billion in annual revenue. St. Jude Children's Research Hospital (2015) offers human services while simultaneously grossing over $1.3 billion annually. Goodwill Industries International, Inc. (n.d.) transforms unwanted goods and objects into revenue and convenience, boasting more than $5 billion in revenue. These FBHSOs were listed in *Forbes's* 2015 top 50 charities list, an annual revenue-based list of charities throughout the world (Barrett & Novack, 2015). Though the *Forbes* list of top charities boasts the name of the organization, receiving revenue is the consequence of the work of executive leadership and staff.

The ability to raise and manage funds is a key requirement of many nonprofit executives' job descriptions today and is considered to be one of the most visible measures of leader effectiveness (Jurkiewicz & Massey, 1998). Venabee and Wagner (2005) affirmed the importance of competent integral executive leadership by performing research regarding the ethical practices of fundraising executives in HSOs. The ethical practices were the focus of their study but the fact remains that there is an expectation for fundraising to occur.

**Preferred skill set.** Hoefer et al. (2013) polled board chairs to discover their preferences when selecting or searching for executive leaders of nonprofit organizations. The results showed that executive leaders with business degrees were among the top preferences for the position, along with being ethical, demonstrating leadership, committing to clients, and having decision-making skills. The literature creates a laudable image of the role of the nonprofit executive. With the results from Hoefer et al.'s survey of board chairs comes the reality that organizations grow with, and as a consequence of, executive leaders. On the surface this seems reasonable. However, considering the reality that permanent positivity and perennial success are nearly impossible, this description also implies the detriment of the organization accompanying the detriment of executive leadership.

**Challenges of Executive Leadership in Human Service Organizations**

Because there is so much pressure on executive leaders of HSOs, it is important to take a closer look at their experience. The demands or challenges they face are significant in certain areas. The research reveals that the greatest challenges for executive leaders in HSOs include resource management (financial and human), accountability and governance, executive problematics, and compensation.

**Resource management.** Executive leaders in HSOs constantly face challenges regarding resources in the areas of human, financial, and relationship capital. Bunger (2012) described this predicament as the dual pressures of competing for limited resources while coordinating administrative efficiency. She recommended administrative or infrastructure partnership with other like-missioned nonprofit organizations and addressed the advantages and disadvantages of such a decision. Trust among organizations has to outweigh competition in order for these partnerships to work and for struggling HSOs to collaborate in order to survive. Collaboration amongst competing HSOs represents a shift in organizational culture and innovation. "This increasing shift of responsibilities for providing social services through nonprofit HSOs requires their effective adaptation to those new conditions" (Jaskyte & Dressler, 2005, p. 24). These new conditions include learning how to operate in a safe partnership with an organization that used to be a competitor when pursuing financial and other necessary resources.

**Retiring workforce.** Executive leaders of HSOs are facing a human capital crisis. The Baby Boomer generation continues to age. Despite later retirement plans (Clifford, 2005), inevitably workforce gaps are upon the nation, specifically in areas of HSO executive leadership. Johnson (2009), who evaluated the ages and positions of executive leaders in four different sectors, discovered that executive leaders in the for-profit sector are aging out or getting closer to retirement at a less frequent rate than executive leaders in the public and nonprofit sectors. The only sector with a higher average age of executive leadership was the government sector. Furthermore, "Two thirds of executive directors plan to leave their jobs within five years, yet most boards are underprepared to select and support new leaders" ("Nonprofit Execs," 2011, p. 26).

**Leadership tenure.** Executive leaders of HSOs also face challenges with the absence of young executive leaders aspiring toward long-term high-level positions. Leadership tenure is a problematic issue in the literature. Several articles address two areas of concern: succession and attrition. In fact, Johnson (2009) analyzed predictions about leadership tenure and Baby Boomer retirement possibilities as a means of predicting the impact of succession and attrition in the nonprofit sector. Bell, Moyers, and Wolfred (2006) polled several executive leaders of HSOs; according to their results, 75% of them admitted that they planned to leave their current jobs within 5 years. One nonprofit leadership article summarized alarming statistics from the book *Daring to Lead By Bell, Wolfred, and Moyers*:

- Two-thirds of executive directors plan to leave their jobs within 5 years, yet most boards are under-prepared to select and support new leaders.
- Only 17% of organizations have a documented succession plan. Only a third (33%) of executives are very confident that their boards will hire the right successor when they leave.
- While 52% of execs are "very happy" with their jobs during their first year, only 37% feel the same way in the following years when job fulfillment and satisfaction with the board drops and they report disillusionment with what boards contribute in terms of support, resources, and strategic thinking.
- Nearly half (46%) of respondents say their organizations have operating reserves of less than three months of expenses. Three months is the minimum level of reserves suggested by experts.
- 33% of current executives followed a leader who was fired or forced to resign, indicating the frequency of mis-hires and unclear expectations. ("Nonprofit Execs," 2011, p. 26)

Retention is particularly critical for healthcare organizations because many areas of the industry are competitive, making it difficult to recruit and retain personnel, especially in executive positions (McAlearney, 2010). Executive leaders in HSOs face the possibility and prediction of personnel deficiencies due to retirement and planned turnover or vacancies in top-level positions.

**Accountability and governance.** Accountability and governance is another area where executive leaders of HSOs face challenges. Executive leaders are accountable to and governed by their executive board members. The board of directors or advisors holds great influence over the executive leader/staff and HSO as a whole. Legally, the executive board is responsible for the organization's success (Duta, 2011). This also means that the executive board will be held responsible, at least legally, for its failures, inaccuracies, or discrepancies. Consequently, executive leader performance, professionalism, and productivity should be monitored and assessed by the executive board.

However, the methods that executive board members use to monitor executive leaders may differ. These methods have been enriched by three popular board behavior theories. The first theory, specifically researched by Caers et al. (2006), is known as agency or principle-agent theory. Based on this theory, boards agree to regularly monitor the behavior of the executive leader. The second theory, known as resource dependence theory, empowers the executive leader to make all the decisions on behalf of the organization, while executive board members agree to be the source of financial resources. In the third and final theory, known as institutional theory, boards more distantly monitor the executive leaders of HSOs by agreeing to offer the resources of their institutions to executive leaders while simultaneously requiring minimal reporting and oversight. These three different theories of board behavior dictate the positive, and sometimes not so positive, experience of executive leaders. Additionally, each theory may require the executive leader to possess a different skill set.

Consequently, agreeing to be an executive leader of a HSO is accompanied by risk. Each executive board team has to build relationships, trust, and expectations among themselves, the organization, and the primary executive leader. How executive leaders manage their response to board behaviors may dictate their longevity in that position. According to Tillotson and Tropman (2014), the likelihood of the executive leaders mismanaging board relationships is heightened depending on the length of tenure, nature of interaction, and information management practices of executive leaders. In response to accountability and governance challenges throughout the HSO industry, these authors suggest implementing monitoring processes to bridge the distance between advisors and everyday management, mitigating manipulation, tracking performance, and making necessary information available to all organizationally responsible parties. Increased transparency may lead to increased responsibility, evaluation, and pressure. It is also easy to comprehend why doing so could lead to difficulty for executive leaders.

Accountability and governance for executive leaders in HSOs are equally important internationally. Jeong and Kearns (2015) studied 12 nonprofit CEOs in Korea, discovering that their accountability structure included board members, staff members, and government agencies. Even without the same official tax status of HSOs, these executive leaders still endure pressures of accountability.  Previous literature limited accountability and governance to board members. Depending on the level of support and structure of the executive team, the board members only represent the most immediate form of governance. However, accountability for executive leaders in HSOs is further complicated by the existence of various stakeholders or *principals* that are accountable to the same *agent* or executive leader (Nikolova, 2014). The necessity to meet the expectations of various, often disconnected, stakeholders can be a challenge. The complexity of accountability and governance that rests on the shoulders of executive leaders of HSOs might prove overwhelming at times.

Executive leaders in HSOs are also governed by the legal structure and expectations that the Internal Revenue Service (IRS) has of nonprofit organizations. As stated in the definitions section, HSOs are nonprofit organizations and the IRS has the responsibility for ensuring that they follow a certain set of legal, structural, and reporting rules. Jiang, Petroni, and Wang (2010) discussed many of the risks associated with organizational finance decisions because of the governance of the IRS. They wrestled with the authority given to the CFO versus the CEO. Scott (2010) listed the information that the IRS seeks to gain on the 990 form, which HSO organizations (officially classified as nonprofit organizations) are required to submit on an annual basis, including board members, compensation explanations, and conflict of interest assessments. Nikolova (2014) further documented the monitoring practices of the IRS, addressing ways to mitigate executive misconduct in HSOs related to compensation. Executive leaders of HSOs are responsible for these different levels of accountability and governance.

**Executive problematics.** The personal life, integrity, and trustworthiness of executive leaders in HSOs are important because they impact the reputation of the organization as all its supporters. In an article about executive leader burnout, Tropman and Shaefer (2004) introduced the significance of *executive problematics or executive decomposition*: the series of challenges that HSOs face due to the decision making of their leadership. For them, executive problematics cause challenges over four stages:

1. Detours – occasional meaningless activity or unproductive busyness.
2. Periderailment – extended meaningless activity or unproductive busyness.
3. Derailment – Personal or Ethical challenges that provoke confrontation with board leadership and occasional dismissal (e.g., substance abuse, breach of trust, low performance; no lasting damage).
4. Flameout – Flagrant behavioral or ethical challenges that demand dismissal (publicly disruptive, personally destructive, self harming behavior).

These stages ultimately culminate in organizational suffering. Tropman and Shaefer (2004) offered a list of HSOs, as shown in Table 2, that have been impacted negatively by the decisions of their executive leaders, as extreme examples of executive flameouts.

Table 2

*Executive Problematics*

| Executive's Name and Initial Year of Issue | Position Held | What Happened? | What Was the Outcome? |
|---|---|---|---|
| Edward Crouch December 1, 1993 | President, Sheet Metal Workers Union | Power Abuse, Drug Habit, and Illegal Spending. | Crouch was forced to resign from his position after a three-day internal trial revealed unapproved spending practices |
| Bill Aramony April, 1995 | President, United Way | Bill Aramony resigned from United Way of America (UWA) | U.S. District Court Conviction on April 3, 1995, on 25 counts, including: conspiracy, fraud, and filling false tax returns. |
| Ellen Cook April 11, 1997 | Ex. Dir. of United Way Pottawatomie, Oklahoma | Alleged misappropriations of funds. | Fired from position. FBI involvement and investigation. |
| Frank Hudson August, 2000 | Catholic Charities Chief | Misuse of charity funds for personal expenses . | Voluntary resignation after board admonishment. |
| Lewis Hickson June 15, 2001 | Ex. Dir. of Capuchin Soup Kitchen, | Alleged embezzlement from the charity. | Imprisonment and repayment mandate |

*Note*. Adapted from "Flameout at the Top—Executive Calamity in the Nonprofit Sector: Its Precursors and Sequelae," by J. E. Tropman and H. L. Shaefer, 2004, *Administration in Social Work, 28,* pp. 164-165. Copyright year by the authors.

Understanding an organization requires an analysis of espoused leadership practices and the reality of the organizational leadership application, found in the practices and behavior of the executive leader (Sturm, Hinden, & Teegarden, 2011). Smith and Nelson (2005) discussed loss of focus and lack of trust as problems that executive leaders in HSOs must face. Lack of charisma and moodiness are among the other executive problematics that impact HSOs and should be addressed ("Executive Update," 2003). Whether the leader's issue is lack of focus, trust, charisma, or moodiness, without careful attention executive problematics can be a devastating consequence.

**Compensation.** This area of executive leadership deserves brief mentioning outside of other issues that executive leaders of HSOs face. Many articles discuss the exorbitant salaries that executive leaders of HSOs make (Anft, Larose, & Voelz, 2001; Barton, Di Mento, & Sanoff, 2006; Barton & Gose, 2008; Galle & Walker, 2014; Nikolova, 2014; Salkever, 1999; Wilhelm, 2003). For example, Anft et al. (2001), Barton and Gose (2008), and Wilhelm (2003) listed the HSO executives that received the highest salaries, taken from *The Chronicles'* annual national survey of executive salaries, as a means of trying to contextualize, legitimize, or criticize their pay. Salkever (1999) discussed one Hawaiian executive leader's salary as motive for federal limitations of HSO salaries. Galle and Walker (2014) applied similar analysis methods specifically to the data from a 10-year study of certain university executive salaries. Executive leaders of HSOs, similar to their for-profit counterparts, face the challenge of wavering opinions about the level of their compensation.

## Executive Leaders of FBHSOs

Executive leaders of FBHSOs do not emerge as a specific topic in the literature. However, some articles have criticized the leaders of secular HSOs. For example, Tropman and Shaefer (2004) offered a long list of executives who have mismanaged their authority, problems that they chose to label executive problematics, as mentioned previously. Venabee and Wagner (2005) discussed similar challenges in examining the ethical fundraising practices of executive leaders of secular HSOs. Other articles have addressed executive leaders of FBHSOs by examining the behavior and experience of church leaders or pastors. For example, Harris (2013) responded to expectations that African American church leaders face in regard to leading influential faith-based institutions. While not explicitly discussing their behavior, Cnaan and Curtis (2013) also discussed congregation leaders (i.e., pastors) being viewed as leaders of FBHSOs.

Consequently, few scholars have reflected on the experience of executive leaders of FBHSOs. There is an even greater disparity of research as it relates to executive leaders of CAHSOs. Therefore, in order to gain a better understanding of the experience of executive leaders of FBHSOs, it is helpful to understand the complex history of FBOs, the evolving definitions that exist in this history, and the various focus areas the literature introduces as a consequence. Doing so will offer a foundation from which to deduce the experience of executive leaders in FBHSOs.

**FBHSOs.** The landscape of literature related to FBHSOs continues to broaden and expand. However, the literature that surrounds FBHSOs is focused on function and leadership. Several articles have directly addressed the purpose of FBHSOs and others have discussed the challenges leaders face within FBHSOs. The predominant function of FBHSO is the delivery of social services to communities in need. Literature introduces aspects of FBHSOs such as a definition, which organizations are included, relationship with government, and even the definition of the term *faith-based*. To clearly understand the complexity of assessment, it is helpful to discuss the organizational literature surrounding FBHSOs and the context of what it means to be called a FBHSO.

**Churches and religious organizations.** The study of churches, congregations, and religious organizations as FBHSOs is simultaneously a study about the history of social services in the United States. “Prior to the development of large public service agencies in the United States, it was more common for religious groups and congregations to provide social services in local communities" (Rogers, Yancey, & Singletary, 2005, p. 190). In other words, religious groups and congregations were the organizations that responded to poverty, social illness, mental unhealthiness, and other challenges in their immediate community.

The phenomenon of churches, congregations, and religious groups operating as community and social service organizations is well documented. Many articles document churches and congregations that continue to respond to various social service needs in their community (Adedoyin, 2013; Barnes, 2005; Lancaster, Carter-Edwards, Grilo, Shen, & Schoenthaler, 2014; Moyer, 2015; Ramírez-Johnson, Park, Wilson, Pittman, & Díaz, 2014; Sakai, 2012; Shirley, 2010). For example, Venable (2015) discussed how the church should serve as a rehabilitation starting point for people who were convicted of a sexual offense as juveniles. Pinson, Register, and Roberts-Lewis (2010) discussed the possibilities of integrating dementia and Alzheimer's care into local congregations. O'Neill, Gabel, Huckins, and Harder (2010) discussed the church as a rehabilitation or resource center with respect to combating child abuse. Other articles have discussed churches or congregations and their relationship with social workers as a means of delivering social services (McAllister & Roberts-Lewis, 2010; McCarty, 2012; Placido & Cecil, 2014; Smith & Teasley, 2009; Yancey & Garland, 2014). A portion of the research endorses the recommendation for churches, congregations, and religious groups, as well as their leadership, being platforms, organizations, or conduits for social service delivery.

The delivery of social services through churches and congregations is so prevalent that Ramírez-Johnson, Díaz, Feldman, and Ramírez-Jorge (2013) performed a study focused on helping Latino church leaders to develop an acceptable method to deliver social services information or resources to their membership and community. Many congregations and religious groups continue to serve this purpose despite the existence of other faith-based or social service organizations. This is particularly the case with African American churches. As Griffin (2006) noted,

> The Black church has functioned as the center of Black people's lives from its origins as an invisible institution during chattel slavery to its present day as a highly visible institution. Being one of the few institutions owned by Black people for Black people, the Black church, at its best, has not only served as a house of worship, but has also provided social status, hope, and stability for the millions of Africans who have lived in America. (p. 55)

The literature highlights social services offered through African American churches in response to HIV/AIDS. For example, Cunningham, Kerrigan, McNeely, and Ellen (2011) interviewed 20 church leaders from 16 churches in Baltimore City (eight of which were predominantly African American in leadership and church membership) and documented their various models for addressing HIV/AIDS in their congregations or denominations. Some churches were bound by organizational or denominational constraints while they implemented HIV/AIDS informational programming. However, the literature presumed that every church had the purpose of informing their congregation about these health concerns.

In response to accusations that African American churches did not participate in HIV/AIDS literacy or programing with urgency, Harris (2013) attempted to explain the complex views that exist within congregations on the topic. "Different cultural understandings of HIV/AIDS make it pertinent that this phenomenon be addressed in such a way as to make it accessible to all populations, especially those it most greatly affects" (p. 309). According to Harris, it was Black church leaders' understanding of the HIV/AIDs phenomenon that explains the response of many influential Black church leaders. Regardless, Harris's attempt to explain the lack of urgency from Black church leaders communicates an expectation that Black church leaders and their congregations normally serve as social service delivery centers when issues impact the African American community.

**FBOs, social service delivery, and welfare reform.** Recent government legislation has expressed an interest in revitalizing support for FBOs that want to serve as social service delivery agencies. Since the 1960s, under President Johnson and President Kennedy, as a response to Civil Rights, the federal government has attempted to address increasing numbers of impoverished communities/family by designating funds toward welfare (Wineburg, Coleman, Boddie, & Cnaan, 2008). This movement, to leverage FBOs in the delivery of social services, created federal expenses that past U.S. presidents have tried to reduce by proposing welfare reform (Aberbach, 2005). Some leaders recommended devolution (delegating to other entities like state leadership or community organizations) as an answer to welfare reform, which was a way of decentralizing and sharing responsibility for indigent communities (Belcher & Deforge, 2007; Leventhal & Mears, 2002).

The next solution was implemented in the late 20th century when the Clinton administration proposed a faith-based initiative, known as the Charitable Choice initiative, a section in the Personal Responsibility and Work Opportunity Reconciliation Act (Cnaan & Boddie, 2002). The purpose of this initiative was to incentivize faith-based partnerships and expand the impact of FBHSOs that deliver social services to suffering populations around the country. President G. W. Bush supported this idea by using his authority to create the White House Office of Faith-Based and Community Initiatives, along with other supportive/satellite offices (Daly, 2013). According to Wineburg et al. (2008), the G. W. Bush administration's goal was to stimulate welfare reform by leveraging FBHSOs as social service delivery agents. The other goal was to move beyond the legal limitations that typically prevent partnerships between government and overtly religious institutions (Anderson, 2009). President Obama and his administration have to continued and expand this work (Pew Research Center, 2009). The government's appeal to FBOs increases the urgency to delineate what it means to be a FBHSO.

**FBHSOs as churches and distinct from churches.** The literature discusses FBHSOs as a broad category that includes churches and other religious organizations. For example, Ramírez-Johnson et al. (2014) surveyed FBOs that offered social services in Hidalgo County, Texas and described his article as a study on FBOs. A closer look at his research population, which he classified as *diverse* and *religiously affiliated*, revealed that 99.6% (244 of 245) of the organizations that were surveyed were Christian churches or church affiliated. Seemingly, the overwhelming majority of Christian church or church affiliated survey participants mandated a description that is closer to church-affiliated or Christian. However, by including one Muslim mosque as a research participant, the research project was accepted and published as a study about religious or faith-based organizations. Placido and Cecil (2014) used the phrase *faith-based organization, including churches,* which directly demonstrate the blending of churches into the broad category of FBHSOs. Clerkin and Grønbjerg (2007) communicated a similar sentiment by referring to churches as *one of the other FBOs*, which does not communicate a distinction as a church or distinct from other FBOs. According to Jeavons (2004), the term *faith* is strongly connected to church or Christian roots, which also supports generalizing churches underneath FBOs.

The literature also discusses FBOs as separate and apart from churches. For example, McMillin (2011) criticized church leadership over the history of faith-based social services that are sponsored by churches. The social service is only connected to the church via sponsorship, which is distinct from the church being a social service providing agency. Shin, Eriksson, Walling, Lee, and Putman (2011) created a more definitive line, describing scenarios where FBOs can use local churches as a source of volunteers in their network. Consequently, any HSO to which the church gives birth is automatically distinct or different from a FBO that seeks to work with it. Terry et al. (2015) clearly delineated the difference between the two:

> FBOs are professional or paraprofessional organizations; as a result, different standards may apply. Where FBOs have a primary social service mission, congregations may include social service as an important secondary mission. Sometimes these distinctions are blurred because religious congregations can be understood as both organizations and communities and may operate programs that provide professional services. (p. 213)

Jeavons (2002) expressed a similar a similar sentiment:

> The typical usage of the new term *faith-based organization* (FBO) as an all-encompassing category for religious organizations, including congregations, is hugely problematic. This is because it glosses over profound differences between congregations and other religious organizations. It is simply misleading to speak of congregations as FBOs. (p. 93)

There is no consensus about whether a church is a FBO, distinguished from it, or a combination of the two. The role of the church in the community is acknowledged while the category debate continues in the literature. The church as a FBO makes logical sense because of its tie to a particular faith tradition. However, there are differences in mission or purpose of existence between the church and other FBHSOs. The literature creates strong cases for each side and serves to strengthen the case for this research project. The discrepancy communicates the stage of understanding at which that scholars have arrived at the present time.

**FBHSOs versus secular HSOs.** Several articles have discussed the distinction, and even tension, that exists between secular HSOs and FBHSOs (Chaves & Tsitsos, 2001; Graddy, 2006; Graddy & Ye 2006; Kissane, 2008). Separation and tension between faith-based and secular HSOs rose to the surface with the emergence of national policy that articulated incentives to work with and support FBOs (Ebaugh et al., 2003; Gibelman & Gelman, 2002). As Terry et al. (2015) noted, “Recognizing the potential benefits of increased collaboration with FBOs in social service delivery, Presidents Clinton, Bush, and Obama have all supported federal initiatives to increase services delivered by FBOs” (p. 214). According to Hefferan and Fogarty (2010),

> Moreover, since the 1996 Charitable Choice Provision and President George W. Bush’s 2001 institutionalization of the Office of Faith-based Initiatives, FBOs have been singled out by U.S. policymakers and activists as distinctive and particularly efficient maximizers of resources, both nationally and internationally. (p. 1)

The decision to focus on FBHSOs simultaneously created a distinction between those organizations (nonreligious and secular) that were currently providing social services.

The faith-based initiative gave rise to research and contributed to the increase of information about FBHSOs. For example, the faith-based initiative encouraged Hefferan and Fogarty (2010) to review the history of FBOs and produce an account of eight Christian FBOs that deliver social services as evidence of this field’s complexity and the need for more research. This article also criticizes previous literature that negatively characterized the missionary efforts of FBOs. Hefferan and Fogarty suggested that negative research may have contributed to the lack of research on the inner workings and positive impact of FBHSOs.

The faith-based initiative caused many authors to investigate why FBHSOs were more preferable than secular HSOs in the eyes of federal leadership (Chaves & Tsitsos, 2001; Graddy, 2006; Graddy & Ye 2006; Kissane, 2008). For example, Graddy and Ye (2006) performed a comparative study on Los Angeles faith-based and secular social service organizations, finding that these organizations can complement one another rather than operating as replacements. Analyzing the results of a 1998 national study of more than 1,200 congregations, Chaves and Tsitsos (2001) found similar results. According to Hula, Jackson-Elmoore, and Resses (2007), confidence in FBHSOs is partially due to the failure of the public sector to address the needs of impoverished communities in the past. However, Hula et al. (2007) still opposed relying on or incentivizing FBHSO partnerships as the solution to the public sector's problems.

Fischer (2004) addressed resistance to increased FBHSO participation by clearly acknowledging the challenges of tracking results in these organizations. He also attributed the lack of data to the difficulty of evaluating faith, lack of capacity of smaller organizations, inability to control attrition or consistency of attendance, and possible impact of staff competency on results. However, unlike other critical articles, Fischer explored the possibility of using the United Way model as a step toward a solution. The United Way model is an eight-step outcome measurement approach that includes developing a measurement system (steps 1-3), operationalizing the measurement system (step 4-5), and collecting and analyzing the results to discover areas of improvement (steps 6-8).

Terry et al. (2015) took a similar position in relation to organizations that deliver educational and psychological social services, asserting that FBHSOs must learn to integrate evidence-based practices (EBPs) as a solution to the lack of systems that track data and outcomes. They also complemented their recommendation by discussing the dangers of partnering with an agency that does not produce measurable outcomes.

> One cannot assume that the provision of psychological or educational services is always beneficial. In fact, a number of psychological and/or educational services are ineffective and even some plausibly helpful interventions delivered with good intentions have been shown to be harmful. (p. 215)

Smith and Teasley (2009) also encouraged the use of evidence when partnering with FBO while acknowledging the possibility that smaller FBOs may lack the personnel and competency to track, produce, and report the evidence or outcomes from the social services they deliver.

In a way, the emergence of the faith-based initiative, resulting in federal laws that incentivize partnerships with FBOs, gave birth to insight on FBHSOs. The previously discussed articles represent a modest portion of the literature on FBHSOs in comparison to secular HSOs and in no way reflect the bulk of information that has been produced. In order to understand the significance and importance of distinguishing faith-based HSOs from secular organizations, it is important to understand the literary landscape of FBHSOs.

**What is a FBO?** The landscape of FBOs becomes more complex as the questions concerning their definition linger. Which organizations are categorized as FBHSOs is a point of discussion and inquiry in the literature. For example, Jeavons (2002) noted, “There is much confusion surrounding the definition of a religious or faith-based organization” (p. 93). He also stated “We are not entering into a bimodal world where organizations must be exclusively one thing or another” (p. 80). However, the literature discusses various definitions of a religious or FBO and a series of methods that justify this classification.

Jeavons (1997) concluded that outside of congregations and denominations it is difficult to classify an organization as *religious*. He cited a story about an organization that used the word *Christian* in their name, but did not accept the label as a religious or FBO. He told another story about an organization that articulated *religion* as the origin of its purpose and mentioned religion in its mission, yet had no current functional or financial connection related to any religious group. Consequently, Jeavons proposed seven key areas that offer insight to an organization's classification as religious or nonreligious, as shown in Table 3.

Table 3

*Jeavons's "Religiousness" Summary*

| Area | Explanation |
|---|---|
| Self identification | Does the organization explicitly self identify with any particular religion? |
| Staff, clients, and participants | What is the religious identity of the personnel involved in the organization? |
| Source of content in material | Where does the content in their material come from? |
| Goals, products, and resources | What are the organizations goals for their programs? What types of people are they trying to produce? |
| Process of decision making | What processes does the organization use to make decisions? |
| Distribution of power | Where does the organizations draw its power. How does the organizations view power? Theological education? |
| Organizational network | What is the classification of the organizations that support and affiliate with the organization of interest? |

*Note.* Adapted from "Identifying Characteristics of 'Religious' Organizations: An Exploratory Proposal (p. 81)", by T. H. Jeavons, 1997, in J. Demerath III, P. D. Hall, T. Schmitt, & R. H. Williams (Eds.), *Sacred companies: Organizational Aspects of Religion and Religious Aspects of Organizations*, New York, NY: Oxford University Press. Copyright 1997 by the author.

Sider and Unruh (2004) performed a study with similar intentions as Jeavons's after arriving at the conclusion that there was no clear definition of what it means to be *faith-based*. They proposed six different *typologies* (five faith-based and one secular) illustrating a spectrum of faith-based characteristics as a means of determining whether or not an organization is religious/faith-based. These typologies included:

1. Faith-permeated – Organizationally and programmatically saturated with religious belief.

2. Faith-centered – When an organization was founded for religious purposes and still remains actively connected to that purpose. The organization is very intentional about acknowledging its religious beginnings.
3. Faith-affiliated – The organization retains some religious influences but does not require affiliation at the staff or participant.
4. Faith-background – Functions and operates like a secular organization but is historically tied to a faith tradition. Some personnel are strongly tied to the history and religious tradition but none of the programs are explicitly religious outside of where they are held.
5. Faith-secular partnership – A partnership between secular and faith-based organizations. The FBO provides support but the secular organization performs administrative tasks.
6. Secular – No religious references or ties throughout the organization.

Additionally, Sider and Unruh looked at how religion was present in the organization as a whole and in the organization's programing to generate results about where they fall in the typology.

Reingold, Pirog, and Brady (2007) reinforced the importance of specifying and understanding the criteria or typology of FBHSOs by giving voice to the people who receive services from FBHSOs in Indiana. After conducting a survey of people who receive services from both FBHSOs and nonreligious organizations, they received similar performances or participant reviews for both. They used empirical data to conclude that people normally receive social services from faith-based and secular HSOs simultaneously, and showed no preference for either. In their opinion, secular and faith-based organizations deserve equal consideration. In the wake of new federal laws to support FBHSOs delivering social services, the implications of their study were paramount. “Furthermore, failure to recognize varieties of faith-based organizations can lead to incongruous funding decisions in the private sector” (Sider & Unruh, 2004, p. 110).

In a comparative case study, Vanderwoerd (2008) introduced two FBOs affiliated with the Lutheran church in the Midwest, both of which simultaneously confirm and contradict the boundaries set by Jeavons (1997) for an organization’s religiousness. For example, these Lutheran organizations self identify as equally religious, yet Jeavons would suggest one is more religious because of the name it uses. Vanderwoerd addressed another discrepancy related to amount and source of funding at its relevance to how religious an organization is. According to Jeavons, significant donations impact classification. However, according to Vanderwoerd, his comparative case study documented organizational allegiance being more influenced by smaller donations that came from religious (Lutheran) donors. This study moved through each of Jeavons’s seven areas of assessment, offering yet another example of the complicated narratives surrounding the classification of an organization as religious or faith-based.

McGrew and Cnaan (2006) agreed with the majority of the literature that supports the complexity regarding the language or vocabulary used when discussing the term *faith-based*. Attempting to further clarify the results from Sider and Unruh’s (2004) study, as well as what organizations fall under the faith-based category, they discovered that the need for clarity was more extensive than they expected. Even terms like *congregation* were in need of clarification. Hula et al. (2007) also included a section on the challenges of defining this term.

Word choice, and particularly the word congregation, prompted Ram Cnaan to revisit this issue in a recent study with another colleague. Cnaan and Curtis (2013) spent the bulk of their article defining the word *congregation*, articulating what it is, where congregations gather, and the various attributes and labels they carry. However, this article was intended to compare the functioning of congregations to the functioning of nonprofit and other voluntary organizations.

**Church affiliated.** No articles could be located about CAHSOs and consequently there was an absence of direct information about their executive leaders. This is partially due to the newness of the term *church affiliated*. The majority of the literature has yet to endorse or regularly use church affiliated as common nomenclature referencing types of HSOs. When searching *executive leaders of church affiliated human service organizations*, even Google failed to find articles, definitions, or organizations that fit this description. Instead, the search revealed numerous articles about HSOs, churches, and ministries of churches.

After modifying the Google search by subtracting the words *executive leaders*, two closely related terms produced minimal research results: religiously affiliated human service organizations and faith-based human service organizations. These results only verify the claim that CAHSOs are not part of the dominant nomenclature in this area of research. These results also verify the lack of consensus about categorizing churches when discussing FBHSOs.

This is not to say that secular, community, religious organizations do not affiliate, partner, or associate with churches. Many HSOs describe their relationship with churches using the word affiliate or similar terms. However, the definition of a CAHSO goes beyond the definitions that are expressed in the dictionary or other reputable source. Documenting the experience of a church is distinct from documenting the experience of the churches' HSO. Documenting the experience of the executive leaders of churches is also distinct from documenting the experience of executive leaders in the churches' HSOs. Consequently, one must rely on the experience of executive leaders in FBHSOs as a primary platform or stating place because the literature has very little to say about any organization that is affiliated with the church (i.e., a CAHSO).

**Challenges of Executive Leaders of FBHSOs**

It is fair to assume that executive leaders in FBHSOs face many of the same organizational issues as secular (or otherwise classified) HSOs. However, the broad history of FBHSOs, discussions of how to classify churches in relation to FBOs, and the various definitions that are evolving in this field of research dictate the professional and conceptual environment within which executive leaders of FBHSO are challenged to function. Although the literature does not directly examine position or functional experiences of executive leaders in FBHSOs, the literature does offer enlightenment about many organizational challenges that are specific to FBOs, and consequently the issues that executive leaders must face.

**Collaboration.** According to Harris et al. (2006), "Executive leadership is a model of leadership that forges collaboration and secures support at a variety of levels" (p. 404). It has been well documented that collaboration creates unique challenges for executive leaders of FBHSOs (Garrow, Nakashima, & McGuire, 2011; Monsma, 2003; Yip, Twohill, Ernst, & Munusam, 2010). Many of the articles about FBOs were sparked by the faith-based initiative known as *charitable choice,* which directly recommends collaboration and government support of FBHSOs (Biebricher, 2011; DiIulio, 2004; Gibelman & Gelman, 2002; Guellich, 2002). However, these articles also introduce issues surrounding collaborating with FBOs, including constitutional concerns, organizational identity, the influence of funding sources, the strategies for including faith in programing or management, and the preferences of governing bodies.

***Faith-based and community or secular collaborations.*** Collaborations between FBHSOs and secular organizations are a consistent theme in the literature. For example, in a case study on secular and faith-based collaborations with the Department of Veteran Affairs (VA), Garrow et al. (2011) found that both organizations achieve positive reviews from their clients. Each organization's personnel also expressed satisfaction with their collaborative relationship with the VA. Ebaugh et al.'s (2007) groundbreaking research documented FBOs collaborating with at least nine different types of organizations (faith-based nonprofit, secular nonprofit, civic organization, special-purpose coalition, medical organization, city government agency, county government agency, state government agency, federal government agency, other) and the purposes for which they collaborated (funding, programs, or volunteers). This research offered quantitative evidence that FBHSOs were more likely to partner with other FBOs than other nonreligious, secular, or government organizations. Rogers (2009) documented the collaborative efforts of three FBOs with government entities and the best practices that emerged from interviews with people from their organizations. Each of these articles informs the often complicated decision making process that executive leaders of FBHSOs face, including making sure that partnerships with secular groups don't jeopardize the moral or theological integrity of the FBHSO they represent.

***Resistance to external support.*** Some scholars have documented instances where executive and pastoral leaders hesitate or cautiously approach secular, nonreligious, corporate, or other external partnerships for various reasons. One of the reasons is related to FBOs' perception of external organizations and their motives surrounding collaborative efforts. According Cnaan et al. (2004), many FBHSO leaders reject often-disingenuous partnerships with external organizations due to the reality that their commitment is short-lived, without sincere concern for the people. Consequently, executive leaders of HSOs face the reality that certain collaborative efforts may not prioritize the people in need and thus should not be pursued even at the expense of garnering extra resources for the organization.

Monsma (2003) offered a similar sentiment while comparing secular and faith-based response to *welfare to work* grant opportunities. In an effort to maintain their independence, many FBHSOs sacrifice access to more resources (government funding) and potentially greater programmatic impact. “Not only do congregations have internal networks of relationships, but they also have external networks within the community which can be very valuable in collaboration relationships (Rogers, 2009, p. 4). Executive leaders of FBHSO have to face the tension among resources, independence, and impact on a regular basis.

In other words, executive leaders must manage the relationship with various entities that offer resources for their operation. The complexity of this task depends on the level of resources that each entity commits to the organization, whether they are external or internal entities, and a host of other factors (Garrow et al., 2011). Particular to FBHSOs, the level of resources that come from external entities prompts resource diversification and other strategies to ensure the progress of the organization.

***Separation of church and state.*** The other issues that executive leaders of FBHSOs face, unlike their secular counterparts, include questions of the constitutionality of these collaborations. As Frederick (2003) stated, “Arguably, government support for faith-based organizations violates the First Amendment’s Establishment clause” (p. 31). According to the First Amendment of the constitution of the United States of America

> Congress shall make no law respecting an establishment of religion, or prohibiting the free exercise thereof; or abridging the freedom of speech, or of the press; or the right of

> the people peaceably to assemble, and to petition the Government for a redress of grievances. (“First Amendment to the United States Constitution,” 2016, para. 5)

Howell-Moroney (2009) noted, “Drawing upon the establishment clause in the First Amendment, some have argued that any type of government partnership with FBOs, particularly ones that involve transfer of government monies, violates this principle” (p. 26). Consequently, executive leaders of HSOs face the consistent threat of legal opposition to certain collaborative efforts.

However, certain scholars disregard separation of church and state as an issue that should not concern executive leaders of FBHSOs. Guellich (2002) argued, “Many faith-based organizations already receive government funding” (p. 86). DiIulio (2004) dismissed the importance of separation of church and state with a few conditions. For him, every organization that is partially or completely funded by the government is responsible for making sure they (a) use funds for religiously neutral purposes and (b) remain open to participants of all religious or nonreligious backgrounds but are permitted to consider the religion of all persons who are seeking employment. Jordan (2008) offered the separation of church and state as a temptation for many executive leaders of FBHSOs to consider reducing the their religiosity in exchange for growth and financial stability.

Regardless, separation of church and state creates a series of factors and decisions that regularly impact executive leadership of FBHSOs. The Establishment clause serves as an area of concern and responsibility to leaders that impacts various other parts of the organization. It also serves as an added element to the complex narrative of FBHSO leadership. Consequently, executive leaders of FBHSOs are forced to consider the impact of a constitutional perspective on their efforts to build relationships and grow their organizations.

**Faith-based accountability and governance.** Similar to other HSOs, FBHSO executive leaders have to face the nuances of accountability and governance. In a case study on the experience of one faith-based nonprofit organization leader, Yip et al. (2010) revealed a nuance in accountability and government. Having his job already made more complicated by the type of faith-based (referencing Jeavons's (1997) categories) organization they would be, Yip et al. recounted the challenges of *long standing* or *major donation* board members using their influence to pressure conflicting leadership decisions. However, the pressure from these board members could be labeled as a faith-based pressure because they desired to prioritize the Christian faith over other religious traditions.

**Declining volunteer workforce.** Another area where executive leaders experience challenges related to human resources is volunteers, whose value in FBHSOs is difficult to overstate. "Volunteers contribute invaluable time and cost savings to an organization" (Warner et al., 2011, p. 391); this is a reality that executive leaders must consistently consider. "Absent volunteers, many charitable nonprofits would not be able to conduct programs, raise funds, or serve clients" (National Council of Nonprofits, n.d., para. 1). Volunteers become more valuable due to the various generations they represent, passions they carry, and communities from which they emerge. According to Gilmore (2012), volunteers fit many descriptions and can be found using various approaches or techniques. It is up to the executive leaders to embrace these realities and ensure the maintenance of volunteers in their FBHSOs.

However, volunteers, in all of their diversity and variety, are still an endangered resource (Warner et al., 2011). The U.S. Department of Labor, Bureau of Labor Statistics (2015) reported, "The volunteer rate declined by 1.1 percentage points to 25.4 percent" from 2012-2013 (para. 1). The Bureau went on to state that "the volunteer rate in 2013 was the lowest it has been since the supplement was first administered in 2002" (para. 1). To give weight, context, and relevance to these volunteer statistics, it is helpful to offer a brief numerical assessment of the community of volunteer-based organizations in the United States. According to the IRS, 85% of all charitable nonprofits have no paid staff and are run entirely by volunteers (National Council of Nonprofits, n.d.). "According to the National Center for Charitable Statistics (NCCS), there are nearly 1.5 million registered Non Profit or tax exempt organizations in the United States" (National Center for Charitable Statistics, n.d., p. 1). "About 62.6 million people volunteered through or for an organization at least once between September 2012 and September 2013" (U.S. Department of Labor, Bureau of Labor Statistics, 2015, p. 1). If each nonprofit organization received an equal share of volunteers over a 365-day period, each nonprofit or religious organization would receive approximately 40 volunteers per year. Assuming each volunteer gives his or her time once a year, many nonprofits would have to struggle to achieve substantial impact and longevity.

Amidst these statistics, some FBHSOs (technically classified as nonprofit organizations) thrive. As reflected in Figure 1, "The organization for which the volunteer worked the most hours during the year—was most frequently religious (33.0 percent of all volunteers), followed by educational or youth service related (25.6 percent) and social or community service organizations (14.7 percent)" (National Center for Charitable Statistics, n.d., p. 5). Based on Figure 1, executive leaders of FBHSOs have the largest pool of personnel from which to recruit when seeking to build or sustain a volunteer workforce.

However, executive leaders of FBHSOs must be willing to compete, as national volunteer statistics decrease while simultaneously dealing with other HSOs and working to maintain the personnel that they have (Warner et al., 2011). In 2013, there were more than 350,000 FBOs in the U.S. (National Center for Charitable Statistics, n.d.), each of which may have proclaimed a need for volunteers. Presuming that the number of FBOs in the U.S. still persists today, for executive leaders of FBOs, great competition still exists. This fierce competition for volunteers, combined with a decline in volunteers, forces executive leaders of HSOs to consider how to respond. These statistics reflect the dire nature of the volunteer situation in the United States. They also imply that executive leaders have to choose between maintaining their everyday workforce and responding to the demand or opportunities created by federal agencies. Bunger (2013) discussed the difficulty executive leaders face when addressing with this choice. The declining volunteer workforce is an issue that remains unresolved.

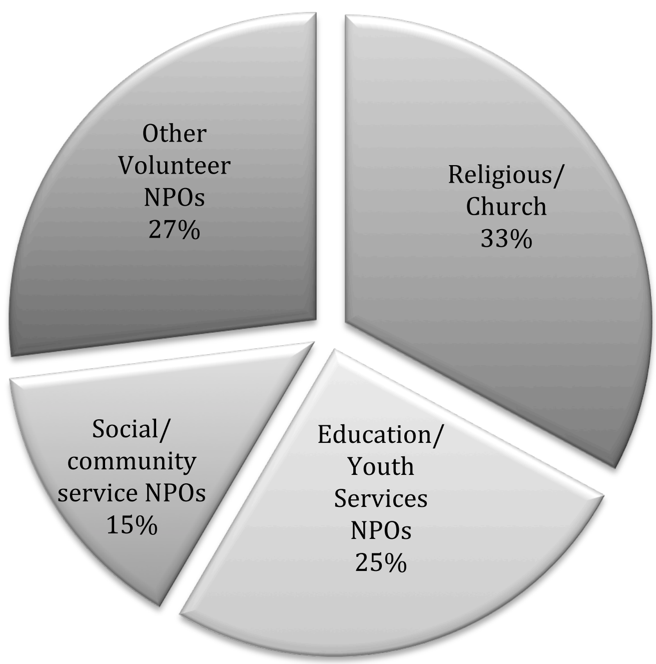


*Figure 1.* 2013 statistics showing faith-based volunteer percentages.

**Capacity.** Beyond the struggle for volunteers, recent federal law has revealed some issues that executive leaders of FBHSOs are still trying to solve. According to Clerkin and Grønbjerg (2007), many organizations may not have the capacity to embrace the new funding opportunities through the federal government. In other words, executive leaders in FBHSOs have to consider their challenges with size and systems, which may cause them to miss out on funding. Glasrud (2011) encouraged nonprofit organizations, which include FBHSOs, to make certain considerations before impulsively attempting to increase capacity. Unfortunately, executive leaders of FBHSOs face capacity building urgency as they race to gain access to the resources that the federal government has made available.

Guellich (2002) used the capacity issue as a means of comparing the experience or dilemmas smaller FBHSOs face in comparison with larger ones:

> The Salvation Army, World Vision, Catholic Relief Services, Catholic Charities, and other large organizations have the capacity to deal with the application, implementation, and reporting rules set for government funding recipients. These same organizations have maintained their integrity while increasing their private support. However, many religious nonprofit leaders question whether small religious organizations can follow that lead. (p. 86)

Guellich went on to suggest that the demand for and shift to federal reporting requirements, currently only mandated for larger FBHSOs, would create more capacity issues for executive leaders of smaller FBHSOs. In other words, the capacity challenges are more significant for executive leaders of smaller FBHSOs.

**Summary**

Leadership is a deep and rich topic of investigation that offers great opportunity for expansion. Executive leadership offers the same opportunity. This chapter provided a brief review of leadership and executive leaders, as well as how these two phenomena operate in the context of HSOs, particularly those that are defined as faith-based. A summary of each topic demonstrated the depth and complexity of each one.

This chapter then provided a review of the literature on executive leaders of HSOs. Many titles and positions make up the executive leadership lexicon. However, the CEO is the main focus of many executive leader discussions. CEOs manage the relationships among the stakeholders and the organization while being responsible for a variety of other deliverables. Executive leaders of HSOs also face a variety of challenges that deal with decision-making practices, their relationship with stakeholders, and their ability to retain talent.

The chapter provided a review of the literature on executive leaders of FBHSOs. Similar to secular HSOs, these executive leaders face many challenges. However, due to the evolving nature of research related to FBHSOs, the literature offers a diverse and complicated set of questions and opinions. To further contextualize the literature on executive leaders of HSOs, this chapter provided a review of the literature on FBHSOs. Researchers are still working to clarify the criteria, vocabulary, and organizations that make up FBHSOs. Clarification in the field of FBHSOs has been complicated by faith-based initiatives that incentivize partnerships between religious institutions and government agencies. This decision has sparked a variety of unanswered questions about FBHSOs. Although resolution is still in process, some pertinent organizational issues that are particular to FBHSOs include volunteer resources, collaboration strategies, and constitutional inquiries.

Lastly, this chapter acknowledged an area where more research is needed regarding the experiences of executive leaders. The term *church affiliated* has yet to enter the dominant vernacular of HSO research. However, the literature did introduce FBHSOs, their history, and the challenges they face as a foundational platform for further inquiry. Research on FBHSOs often includes churches and other religious organizations. From this information, this chapter created a case for much needed conversations about CAHSOs and the experience of their executive leaders.

## Chapter 3: Design and Methodology

The study of FBHSOs is growing as the federal government appeals to them to play a key role in welfare reform by delivering social services to poverty-stricken communities throughout the United States. While FBHSOs are well researched, in various areas, the leaders of FBHSOs continue to suffer neglect. This reality is seen increasingly in relation to CAHSOs. Although many articles discussed the impact of the church in underserved communities, none of the literature mentioned HSOs that are affiliated with the church or the people that lead them. The lack of research creates a gap of knowledge for those who intend to create or sustain similar organizations. It also inevitably risks the well being of communities that depend on Churches with HSOs for food, clothes, and other vital daily resources.

The rate of nonprofit organization creation compounded the urgency for this research. According to Blackwood, Roeger, and Pettijohn (2012), the number of nonprofit organizations increased at least 24% from 2000 to 2010, composing a substantial part of the U.S. economy. In 2010, religion related and human service organizations together made up 40% of the charitable organizations and accounted for $209 billion in revenue. These resources are at risk when there is a lack of research related to how executive leaders create, maintain, and serve these organizations.

Accordingly, the purpose of this study was to determine the challenges that executive leaders face in CAHSOs, the strategies and practices they use to address these challenges, and how these leaders track the success of the solutions they implement. This study also sought to determine what advice executive leaders would give to emerging leaders in their field. This information will be used as a practice resource for churches with HSOs. It will also inform the field of HSO research about the unique experiences and practices of executive leaders in CAHSOs.

This chapter includes the following sections: Nature of Study, Methodology, Research Design, Interview Protocol, Statement of Personal Bias, and Data Analysis. Each of these sections includes clearly detailed steps about the research project and the steps that were taken to legitimize the results. The chapter concludes with a summary of the research design and the steps to ensure its validity, usability, and clarity.

**Nature of Study**

This study used a qualitative research approach to gather data. The goal of this research approach was to capture and interpret the experiences of at least 15 executive leaders of FBHSOs. In order to appreciate the depth of the data, it is important to understand the nature or fabric of qualitative research, something is not explained easily or simply (Creswell, 2013). The qualitative research approach continues to evolve as researchers and methodologists gain more information about the nuances inherent in the methodology. Despite its evolution, it simultaneously offers an opportunity to extract genius from the stories, decisions, and opinions of research participants.

Consequently, four questions drove this study's goal. As stated in Chapter 1, the research questions were:

- What challenges do executive leaders in church affiliated human services organizations face?
- What strategies have executive leaders in church affiliated human services organizations devised to overcome these challenges?

- How do executive leaders in church affiliated human services organizations know if their strategies and practices are effective?
- What recommendations would church affiliated human services organization executive leaders make to professionals in the field?

These research questions were used to generate a series of interview questions that executive leaders of CAHSOs were invited to answer. The research design permits each participant to answer these questions in comfortable and non-threatening environments, which is a cornerstone of qualitative research and design. "In addition, qualitative research is done in the 'field' or natural settings and requires ongoing data analysis. Data collection and methodology are typically elastic, allowing for modifications throughout the research process" (Vishnevsky & Beanlands, 2004, p. 234).

These answers were transcribed and matched with notes taken during the interview. Using this information produced a significant pool of information to support the qualitative research method. As Creswell (2013) noted, "Unquestionably, the backbone of qualitative research is extensive collection of data, typically from multiple sources of information" (p. 52). Consequently, additional data like body language and tonality were documented.

The use of recording equipment and hand written notes allowed accurate information to be captured. According to Creswell (2013), the accuracy of this part of the process prevents false conceptions of the data. Principal investigators are invited to seek clarity during the interview to ensure understanding. The data from interview questions were transcribed, analyzed, and coded.

**Qualitative research.** "Qualitative research begins with assumptions and the use of interpretive/theoretical frameworks that inform the study of research problems addressing the meaning individuals or groups ascribe to a social or human problem" (Creswell, 2013, p. 44).

These assumptions are (a) that multiple realities will exist in the research, (b) that accurate research includes an intentional immersion into the research participants' context, (c) that every researcher must report his/her own biases or influences related to the study, and (d) that the results of the research will be discovered after analyzing the data, which means no pre-assumptions can be shared with confidence. Consequently, various social positions emerge in the data, such as constructivist, interpretivist, feminist, and postmodernist (Creswell, 2013). Furthermore, there are various approaches to how information is collected or reported in the study, such as phenomenology, narrative, or grounded theory.

Qualitative research includes intentional setting selection, proper data retrieval, an acceptable data interpretation process, attentiveness to accurately understanding collected data, acknowledging personal biases, holistic research results, and flexibility throughout the process (Creswell, 2013). It requires disciplined analysis, faithfulness in time commitment, and accurate data collection. According to Creswell (2013):

> Several aspects will make the study a good qualitative project: rigorous data collection and analysis; the use of a qualitative approach (e.g., narrative, phenomenology, grounded theory, ethnography, case study); a single focus; a persuasive account; a reflection on the researcher's own history, culture, personal experiences, and politics; and ethical practices (p. 65)

Qualitative research adds legitimate interpretive value to understanding the object of its investigation. Although the research participant is important, how accurately and creatively the researcher understands and interprets that research participant's data is more important. "Qualitative research methods engaged the researcher's ability to collect information, sort information, and translate the information derived from talk or observations" (Khankeh, Ranjbar, Khorasani-Zavareh, Zargham-Boroujeni, & Johansson, 2015, p. 636). Consequently, it is impossible to predict what the research will reveal. Instead, qualitative research is more about progress and journey and less destination. Qualitative research requires stepping into the world of the research participant, attempting to document the participant's assessment of truth and importance.

Qualitative research emphasizes the value of interpretation and meaning. It illuminates the reality that everyone does not see the world the same way. According to Chen (2016), many scholars in China were resistant to qualitative research in early 1900s because it was "too 'subjective,' 'impressionistic,' and 'unsystematic'" (p. 73). However, this method was deemed valuable in this study because it could do more than simply capture information from executive leaders. Rather, it enabled the reader to appreciate the perspectives executive leaders share and honor the words that they used to communicate this perspective. "In qualitative research the amount of time and effort spent interviewing the participants is characteristically less than the time spent on the analysis of the data" (Thorpe, 2013, p. 38). As a result, this research method requires significant time to review and translate data.

Qualitative research assumes that researchers do not begin as objective thinkers (Creswell, 2013). Therefore, the nature of this type of study includes disclosing and mitigating the influence of person experience or opinions. While subjectivity is impossible to eliminate, full disclosure gives the reader a better idea of where bias and personal opinion exist within the research.

**Methodology**

In choosing a method, Creswell (2013) recommended starting with the desired outcome, considering which method gives the research participants the greatest familiarity or comfort, considering one’s skills in delivering each method, considering which method will contribute most to the field of research, and ascertaining which method gives the researcher the most comfort. As a result, surveying one’s own insecurities, social or vocational strengths, and communication tendencies was part of the methodology choosing process. The lack of research in this area also influenced the choice of methodology. After considering these factors, a phenomenological approach was the best choice, which investigates an individual’s perception, opinion, or interpretation of an experience or phenomena. This approach included interview questions and analysis in attempting to assess the experience of executive leaders in CAHSOs.

The researcher considered other approaches to help reach the goal of this study. The five qualitative research approaches (narrative, case study, grounded, ethnography, and phenomenological) have many commonalities, but they also have important differences (Connley, 2010). Their commonalities created some intriguing possibilities. For example, all these methods included interviewing as part of the data collecting process. The narrative approach gives an opportunity to gain specific details about the participants’’ experience. Grounded theory offers another opportunity to gain specific details by performing interviews, except the audience and purpose of the research changes.

Even the results of the different methods were intriguing. For example, the ethnographic approach offers an opportunity to be completely submerged in the culture being studied. This approach would have permitted and encouraged extended amounts of time with one specific research participant. The case study approach offers intimate details of a particular situation. Both narrative and case study methods were intriguing, but was outside of the scope of information this study intended to collect.

Some of the approaches posed challenges for the research. For example, ethnography requires that the researcher investigate one group of people who share the same cultural experience. Using this method would have eliminated the bulk of research participants in this study because culture is a unique part of every organization, which means no two organizations share the exact same culture. Furthermore, the nature of the research participants' responsibility (executive leadership which may require a level of confidentiality and exclusion) may have been unable to accommodate the presence of another person. The narrative approach also created challenges because this method only gathers feedback from one person. This method was not chosen for a variety of reasons, including the inability to receive feedback from other leaders in the industry being studied. The case study method was not ideal because it is specific to a particular organization and the research is too scarce in this area to select one research participant's organization over another. Although each method is worthy of consideration, the phenomenological approach provided the most convenient and inclusive method for this study.

**Phenomenology.** Phenomenology gathers data on several individuals' interpretations of the same lived experience. "Reports of phenomenological studies provide a 'rich' description of the meaning of a lived experience using direct quotes from participants as examples" (Vishnevsky & Beanlands, 2004, p. 236). Phenomenology is the product of Edmund Husserl's work, which was later complemented by Martin Heidegger and made more applicably diverse by Jean-Paul Sartre and Maurice Merleau-Ponty (Kvale & Brinkmann, 2009). Creswell (2013) highlighted features of the phenomenological research method, each of which is included in this study.

The research of Edmund Husserl and his contemporaries evolved into two types of phenomenology: descriptive, which includes bracketing or mitigating bias when analyzing the data, and interpretive, which permits the inclusion of bias when analyzing the data (Reiners, 2012). Transcendental phenomenological assumptions were used to complement the descriptive phenomenological method in this study. Unlike hermeneutic phenomenology, which bases its interpretations on an intense study of historic text or information, transcendental phenomenology prioritizes the research participant's interpretation of his/her own experience over the researcher's interpretation. Consequently, the research participant's personal experience and interpretation was used to arrive at more descriptive and transcendental assessments of the data.

Interviewing is the primary source of data in the phenomenological process (Connley, 2010). The interview process also included intentionally observing the research participants' unspoken communications. As Creswell (2013) noted, "Interviewing and observing deserve special attention because they are frequently used in all five approaches to research" (p. 163). Each individual received the same invitation and was asked same set of questions. Each individual was interviewed using a digital recording device in a location that met all of his/her interviewing preferences. None of the interviews included written surveys, email questions, or other electronic or remote data collection sources. The information from participants' responses was used to draw conclusions about how to operate a CAHSO properly and prosperously.

**Research Design**

Phenomenological research is a well-studied topic and comes also with a variety of research design options and suggestions. Fifteen executive leaders of different CAHSOs were chosen to interview as part of the research project. Creswell (2013) suggested a number of research participants that is typical for phenomenological research projects, within which this study's participant pool fell. However, Turley, King, and Butt (2011) argued that the depth and quality of the data should take precedent over the amount of participants. Englander (2012) complemented Turley et al.'s perspective, emphasizing that the researcher should be particularly concerned about obtaining a sampling size that is ideologically representative of the population being studied. Regarding qualitative research, Nelson and Quintana (2005), also prioritized accurate and well-represented phenomena over the value of sample size.

The lack of research in this field made it difficult to identify a broader audience of possible research participants. These limitations also shed light on the reasoning behind the choice of purposeful sampling (to achieve maximum variance) and sample size. Consequently, the researcher strove to gather organizational perspectives from 15 different individuals as a way of yielding a general perspective on the experience of a group that has received so little literary attention. Each participant was given a consent form, allowed to dictate his/her natural setting, and interviewed with all ethical boundaries considered. Because the sample size was small, the researcher had to use a form of purposeful sampling known as maximum variation sampling. According to Creswell (2013),

> This approach consists of determining in advance some criteria that differentiate the sites of participants, and then selecting sites of participants that are quite different on the criteria. This approach is often selected because when a researcher maximizes differences at the beginning of the study, it increases the likelihood that the findings will reflect differences of different perspectives- an ideal in qualitative research. (p. 157)

Some of the differences or criteria might be related to worldview, gender, race, and other factors that ensure a diverse and inclusive result.

## Participant Selection

**Analysis unit and criteria for inclusion/exclusion.** One executive leader of a CAHSO was the analysis unit for this research project. Qualified research participants had to have at least

3 years experience and be at least 25 years old. The researcher also attempted to limit participation to one person per organization. The preferred executive leader positions included COO, President, or Executive Director; however, other C-suite positions were considered. Gender and experience did not serve as chief prerequisites, although age and time in position did.

**Participant selection process.** A synthesis of an Internet-based lists and industry references was used to generate an adequate group of participants. The list included key contact information like the person's name, the organization's website, company office numbers including individual telephone extensions, exact position title, and location of office, where applicable. The first step in generating this list included a Google search for churches that have nonprofit organizations or social service ministries in the southern California area. Similar searches were conducted replacing the word *nonprofit* with the words *human services*. Depending on the amount of potential research participants in the initial search, broader geographical language was used by changing *southern California* to *California,* or removing geographical language all together.

A Microsoft Excel spreadsheet was used to document potential participants' contact information including name, position, phone number, email, and office address. The name and company information were used to perform a secondary Google search as a way of verifying the information from the initial Google search and learning more about each research participant. Since inclusion and exclusion criterion included age and tenure, hire date, history of work in the industry, and participant's photograph were also considered when the information was available. A Microsoft excel document was used to record this information, as shown in Table 4.

Table 4**.**

*Data Collection Chart*

| Name | Position | Organization | Email | Phone 1 | Age | 3 Yr.+ | Bio | Pic |
|---|---|---|---|---|---|---|---|---|
| Sam Jones | Executive Director | Calvary Development Corporation | Sjones@CDC.org | (888)555-#### | x | x | x | x |

Where information did not exist, individual biographical search information (like personal name, church name, religious affiliation, etc.) was used to search for missing information, leveraging social media and other public media sources. Where information was not discoverable, the potential participant was moved to a list for secondary inquiry (presuming enough participants/candidates were not secured).

The researcher chose a field of research where he has 10 years of employment history. Many of the potential research participants were colleagues, competitors, mentors, community leaders, and potential business partners. Each of their names was added to the list as a potential research participant after using Google to verify employment and current tenure. Each potential research participant's (colleague, competitor, mentor, community leader, or business partner) individual contact information was retrieved from the researchers previously constructed CAHSO network list and verified with a personal phone call or Google search (if possible). If this process did not yield a sufficient amount of research participants, the Google search engine was used to find other potential research participants. After exhausting the Google search engine, polling colleagues, competitors, mentors, community leaders, or potential partners for suggestions about possible participants was the next step. Once given references, the previously described process was used to secure accurate contact information and verify inclusion and exclusion criteria.

**Protection of human subjects.** Protection of human subjects is a valuable and important part of research. Consequently, the Institutional Research Board (IRB) has a series of qualifications and questions that guided the research process. Language and phrasing was carefully and strategically composed to invite each potential research participant (See Appendix A). This process was approved by the dissertation committee and sent through formal IRB certification channels. Each potential research participant was also given a consent form that articulated the agreement (See Appendix B).

**Data Collection**

Data collection began with confirming research participants' involvement, a process that requires certain steps. Each participant was contacted through email or via an introductory telephone call. The email began with a statement of thanks and an explanation of how the researcher received his/her contact information, where a prior relationship or connection did not exist. This information at the beginning of an email or phone call increased credibility through a pre-existing relationship or reference. The email or phone call included the researcher's name, institution, and topic of study. The invitation being part of the pursuit of a doctoral degree was used to gently invited the executive leader to participate. This email served as a recruitment script that was read during the telephone introduction or on the prospective participant's voicemail. Authors sometimes collect data without receiving or indicating that they received IRB approval, and with no plan for a systematic methodology, position, or research framework (Green, 2015). Therefore, the researcher only used the script after it was approved by the IRB.

Following the approval of the recruitment script, each participant was invited to participate in the study. There was no guarantee that each participant would accept the invitation. However, securing 15 executive leaders of CAHSOs continued to be the goal of the research. All participants were subject to the participant selection process (See Participant Selection Section), which simultaneously eliminated inconvenience, feelings of discomfort, or lack of knowledge about participating in the interview. Once participants accepted, within 48 hours, full contact information was requested and an electronic copy of the Research Participant Acceptance Letter and Interview Location Preferences form was sent (see Appendix C).

After this document was returned, a calendar invitation was sent to each research participant confirming the correct time and place. The individual had to return the document in order to qualify as a research participant. Each participant received an electronic calendar invitation labeled *Dissertation Interview Confirmation* including the agreed upon location and time. The scheduling procedure was adjusted to suit the preferences of each research participant. For example, some preferred to schedule by text, others needed a Microsoft Outlook calendar invitation, and still others leveraged administrative support personnel to document their appointments.

After scheduling each interview, manila folders were prepared that included driving instructions and any information related to parking or facility entrance for each research participant. This occurred no more than 48 hours after confirming the date and time of the interview. Each folder was placed a portable filing box and carried to each interview.

Each interview was scheduled for no longer than 90 minutes. However, 3 hours of time were allotted to account for travel and set-up procedures. Each interview included arriving in business attire with a portable filing box that included five pens, three note pads, four bottled waters, a pack of batteries, an interview timer, and three digital recorders. Interview location preferences were confirmed 30 minutes before the interview was scheduled to begin. All interview equipment and writing utensils were tested to ensure functionality. After declaring the location appropriate for the interview, three digital recorders were arranged and personal cell phone (or other noise emitting devices) were silenced to ensure an uninterrupted clear audio recording during the interview. The research participant was welcomed and invited to sit facing the interview devices. The informed consent document and research purpose was reviewed. The length of the interview was clarified. Each research participant was invited to mute or silence his or her cell phone (or other noise emitting devices), and offered water for convenience.

The recording began and interview commenced after the research participant settled into a comfortable position. The interview included the reading of an introductory statement, review of the research purpose, and 4 previous prepared research questions (See Appendix E). A notepad was used to take notes, document follow up questions, and capture key terms or visual responses.

Close attention was given to data that would not appear on the audio file to mitigate the substantial risk of missing information during data collection. Body language, gestures, and tonality would be missed without attentiveness to visual and nonverbal communication that occurred during the interview. For example, transcribed interviews do not record tone, body language, tears, or hesitation. This kind of data, however, is important to gather. Therefore, the researcher planned to capture such information by visually observing the research participants' tonal and physical response to each interview question while taking written notes when nuances were observed or heard.

**Interview Techniques**

Several factors must be considered when conducting a qualitative interview using phenomenological methods. First, the researcher must regulate the power relationship with research participant. According to Kvale and Brinkmann (2009),

> There does not need to be any intentional exertion of power by the interviewer; the description concerns the structural positions in the interview, whereby for example subjects may, more or less deliberately, express what they believe the interviewers authority wants to hear. If power is inherent in human conversation and relations, the point in not that power should necessarily be eliminated from research interviews, but rather that interviewers ought to reflect on the role of power in the production of interview knowledge. (p. 34)

Creswell (2013), however, interpreted this adjustment or elimination of power as a shift to collaborative interviewing, deeming it ideal or necessary.

Attention must be given attention to the formulation of the questions, how they are asked, and how they may be received. The description for this type of interview is *semi structured*.

> This kind of interview seeks to obtain descriptions of the interviewees' lived world with respect to interpretation of the meaning of the described phenomena. It comes close to an everyday conversation, but as a professional interview it has a purpose and involves a specific approach and technique; it is semi-structured—it is neither an open everyday conversation nor a closed questionnaire. (Kvale & Brinkmann, 2009, p. 27)

This technique offers the comfort of normal conversation while simultaneously and strategically moving toward a specified goal. The researcher must consider whom he or she is interviewing to ensure that prior relationships with the research participant do not disrupt the rendering of feedback. Furthermore, the interview process requires energy, focus, and attentiveness. Research participants should be encouraged to explain the meaning of words and offer specific examples during ambiguous explanations. The researcher be sensitive to various types of responses and be prepared to adjust if the research participant communicates discomfort or distress. Staying engaged throughout the process is the goal, which might differ in degree of difficulty from one interview to the next.

All of these techniques were considered for this research project. The interviews included flexible movement through research interview questions, with clarifying questions being inserted at the researcher's discretion. The research participants' responses were recorded on a digital device and subsequently transcribed. Each interview began with a welcome, purpose of interview, review of agreements, completion of consent forms, moment for questions, and a thank you for participating. The researcher was prepared to thank the research participant for his/her time if the research participant decided not to participate after reviewing the consent form, agreements, or hearing the welcome. The researcher simultaneously took written notes as a backup for faulty recording equipment. The interview was concluded with a general thank you to the research participant and an explanation of what the next steps would include.

**Interview Protocol**

The next important part of the research project is the process, tools, and approval of interview material. As Creswell (2013) noted, "Challenges in qualitative interviewing often focus on the mechanics of conduction the interview" (p. 172). The mechanics of interviewing are so important that Kvale and Brinkman (2009) spent more than 300 pages and 17 chapters discussing how to interview, who to interview, how to report interviewing, how to interpret interview knowledge, and diverse perspectives in the field. According to Kvale and Brinkman, "Interviewing rests on the practical skills and the personal judgments of the interviewer; it does not follow explicit steps of rule-governed methods" (p. 17). Consequently, interview implementation and results vary in quality. The researcher must acknowledge his/her own skill and anticipate solutions or adjustments that will contribute to the best results.

To remedy and standardize the interview in research projects, the interview protocol process was used. This protocol includes a validity process that involves connecting research questions to the interview questions and gaining approval, after deciding upon and describing interview techniques, choosing interview instruments, and making sure the information gathered is reliable. The validity of the interview questions was established using a three-step process: assuring prima facie validity, peer review validity, and expert review validity.

**Prima facie validity.** The first step in establishing validity is making sure the research questions are well connected to the interview questions, a process that establishes what is known as prima facie validity. According to Berger and Gee (2007), this is the least acceptable form of validity, and without further analysis or feedback, the data retrieved through interview questions would lack credibility and jeopardize the validity of any research that uses this data. According to Shrader-Frechette (2000), "The main purpose of prima facie is to 'engage in ethical analysis'" (p. 47). Therefore, to consider the results of ethical analysis, which in this study produced interview questions, without other validation processes challenges the credibility of pending research results.

The purpose of the research questions is to gather information about the lived experience of the research participants. Information from the literature review was used to create the interview questions and subsequent follow up questions. The following questions served as the primary interview questions:

- *Related to RQ #1*: What challenges do executive leaders in church affiliated human service organizations face?
  - What challenges do you face in leading your church affiliated human service organization?

- *Related to RQ #2*: What strategies have executive leaders in church affiliated human service organizations devised to overcome these challenges?
    - o What strategies have you implemented to address the challenges within your organization?
- *Related to RQ #3*: How do executive leaders in church affiliated human service organizations know if their strategies and practices are effective?
    - o What is your definition of success for your human service organization?
- *Related to RQ #4*: What recommendations would church affiliated human service organization executive leaders make to professionals in the field?
    - o Share some of the main lessons you have learned as an executive leader in a human service organization.

The follow up questions included:

- Which of these challenges give you the highest level of stress?
- Describe your responsibility in the corporations or organization
- What is your normal response to challenges in your organization?
- What strategies have been most effective during your tenure as an executive leader?
- How do you know if your executive leadership strategies worked?
- How to you track your improvements or adjustments as an executive leader?
- Who is responsible for assessing the effectiveness of strategies and practices in your human service organization?
- What recommendations would you make to other leaders in your field?

**Peer review validity.** The next step in establishing the validity of the interview questions was peer review. According to Hovardas, Tsivitanidou, and Zacharia (2014), this step is helpful for the peer assessor because it builds critical thinking skills, gives the assessor exposure to various writing styles, and forces the assessor to gain a better understand of the material being assessed, among other things. “The role of the peer assessor requires students to assess peer work and to produce feedback, which often includes qualitative comments, suggestions and recommendations in addition to (or instead of) marks” (p. 135).

Interview questions went through a two-step process of approval, including peer feedback and adjustments based on their recommendations. Peer feedback personnel included two doctoral candidates who are concurrently pursuing their Doctorate of Education in Organizational Leadership degree at Pepperdine University and were simultaneously moving through their dissertation process. Each person was given a cover sheet (featuring instructions), summary statement, and table as means of structuring the feedback they were to give (See Appendix D).

Feedback was collected from each peer review team member. Suggestions from the peer review committed were considered and implemented. The results of the peer review were presented to the dissertation committee for review.

**Expert review.** The next and final step of the interview protocol approval process is expert review. According to Gielen, Peeters, Dochy, Onghena, and Struyven (2010), “Peer judgments or advice may be partially correct, fully incorrect or misleading” (p. 305). Furthermore, Gielen et al. and Hovardas et al. (2014) expressed concern about the quality of peer feedback. Consequently, the interview questions that emerged after the peer review process were assessed and approved as part of the expert or final review process.

The substance and weight of expert feedback are comparatively more conclusive than that of peer feedback (Gielen et al., 2010). The dissertation committee participated in the final review of the interview questions. The dissertation committee members have all completed doctoral level studies that involved qualitative and quantitative research methods and data analysis. The dissertation committee was given the same table, summary statement, and instructions. However, the table included the recommended adjustments from the peer-review validity process.

**Final interview protocol.** The expert review also includes assessing and approving the steps to remain within the interview protocol. Appendix E presents the final interview protocol for the study, which was reviewed by the preliminary review committee and finalized by the dissertation committee. Since the protocol was designed for a specific one-time usage, traditional methods of establishing reliability of a data collection instrument were not applicable.

**Statement of Personal Bias**

Researchers face certain challenges when investigating fields in which they work or have experience, such as acknowledging and disclosing or strategically nullifying any personal bias. Creswell (2013) suggested that this process can be achieved via what is called transcendental phenomenology. This type of phenomenology, in contrast to hermeneutic phenomenology, requires the participant to reflect intentionally (i.e., the epoche exercise) on the significant experiences that may impact his/her interpretation of the data. This information is then recorded or acknowledged as a possible influence in the data analysis process. This process hopefully helps to produce the most objective assessment of the data and feedback regarding the research participants.

The researcher was experienced in the field as an executive leader of a CAHSO. Consequently, the process of epoche was an essential step before analyzing the data. This process provided a way to ensure descriptive and transcendental phenomenological integrity. “Setting aside prejudgments is called ‘epoche,’ a Greek work meaning to refrain from judgment”

(Moerer-Urdahl & Creswell, 2004, p. 6). Reflection was most helpful, and the primary exercise, when executing epoche. Taking time to reflect revealed prejudgments and bias that could potentially impact the research. Key lessons from mentors about being an executive leader of a CAHSO surfaced during reflection including lessons about why other similar organizations and leaders fail or go out of business. Disconnecting from this advice was challenging. Realizing the limitations of the opinions of mentors and the need for subjectivity was helpful.

Assumptions about financial burdens and human capital concerns; opinions about how the executive leader should connect with the organizations mission; and opinions about the role of executive leaders in CAHSOs were also part of personal bias. The issues of gender and culture were influential on the researcher's assumptions while assessing results and analyzing the data. The impact of several male African American leaders and their advice potentially further contributed to the personal bias in this research.

The limited amount of literature on this area of research stimulated the researcher's curiosity. The main goal of the research project was to inquire about the experiences of executive leaders and the similarities and differences thereof. The researcher anticipated learning the secrets of success in this field. The researcher also anticipated discovering tips to help sustain and create other CAHSOs, with the goal of supporting the ministries affiliated therewith. These assumptions and curiosities are also part of the researcher's personal bias. The researcher's bias offers a great opportunity to practice Creswell's (2013) collaborative interview techniques and exercise Kvale and Brinkmann's (2009) *deliberate naiveté*, which requires intentional inquiry, active listening, and purposeful ignorance.

**Data Analysis**

After obtaining the data, the researcher must move through a process of interpretation. Phenomenological research involves several steps. According to Kleiman (2004), the researcher must:

1. Interview (or otherwise collect) and document the information from the research participant.
2. Divide information received from research participant into meaningful statements or phrases.
3. Examine these statements for meaning related to the phenomenon of study.
4. Organize these meanings into workable ideas or conclusions about the phenomenon.

The data analysis process offers an opportunity for the researcher not to go native, as described by Creswell (2013):

> In analyzing the data, certain ethical issues also surface. Because qualitative inquirers often spend considerable time at research sites, they may lose track of the need to present multiple perspectives and a complex picture of the central phenomenon. They may actually side with the participants on issues, and only disclose positive results that create a Pollyanna portrait of the issues. This "going native" may occur during the data collection process, and reporting multiple perspectives needs to be kept in mind for the final report. (p. 60)

The first step in the data analysis process was information transcription. A transcription service converted 90% of the audio recording to written documents. However, to better understand the data analysis process, the researcher transcribed one interview.

Categorizing and coding the information was the next part of the data analysis process. Saldaña (2013) described the mechanics of coding and interpreting data as a process that includes several cycles of review. After several rounds of review themes were proposed and a table was produced. As Saldaña noted, “The act of coding requires that you wear your researchers analytic lens. But how you perceive and interpret what is happening in the data depends on what type of filter covers that lens” (p. 7). Other researchers, depending on their lenses, may draw different conclusions. Therefore, the researcher strove to appreciate the uniqueness of the data analysis process and worked to avoid the impulse to feel perfect or mistake-free in this process.

Choosing a coding scheme was not easy due to the many options that Saldaña (2013) provides. Coding is extremely important because of the benefit it introduces to the researcher. Saldaña noted, “It is an opportunity for you as a researcher to reflection deeply on the contents and nuances of your data and to begin taking ownership of them” (p. 100). According to Fereday and Muir-Cochrane (2006), “Encoding the information organizes the data to identify and develop themes from them” (p. 4). Thomas (2009) offered the *inductive* coding and keys step as a means of identifying and developing those themes. For him, the key to the inductive method is allowing frequency, regularity, or similarity to guide the researcher to condensed data, foundational theory, and clarity between research and findings.

The researcher used a synthesis of Kleiman (2004) and Thomas (2003) to determine the steps for data analysis. These steps included:

- Transcription: Audio recorded data were compiled and a transcription service was hired for accuracy purposes.

- Read and Re-read: The researcher read each transcription repeatedly to ensure understanding, discover frequency or repetition, and familiarize himself with the content of each interview.
- Create and Examine: Frequency and repetition were used to design categories. The new information from repeated review of the transcriptions revealed new information by which to refine categories.
- Divide and Define: The researcher attempted to combine categories based on similar definitions. The clarity of different concepts was also established.
- Review and Conclude: Results were reviewed regularly to ensure proper conclusions were drawn and strengthened theoretical proposals. Information from the review was used to draw conclusions and propose theories related to the experience of executive leaders of CAHSOs.

In later rounds of analysis, the researcher used emotional coding to discover the research participants' feelings, descriptive coding to further understand the basic topics in their responses, and narrative coding to capture the essence of the research participants' experience.

**Inter-rater Reliability/Validity**

To establish inter-rater reliability and validity, a three-step process was followed, including coding and conclusive peer and expert review. First, the researcher completed the individual coding process. Next, the researcher worked collaboratively with two doctoral candidates (co-reviewers) to discuss the coding results, including allowing time for individual review, followed by reconvening the group to deliver recommended improvements where necessary. This process also helped to established inter-rater reliability, which is the process of comparing the opinions of several reviewers to ensure consensus. Finally, after implementing recommendations from the peer-review exercise, the researcher presented the results to one dissertation committee member for expert review and approval before submission. Where there was no consensus with in the expert review, the faculty would review the coding results and arrive at a final conclusion. The results of that submission are reported in the following chapter.

**Summary**

Qualitative research is a process that relies heavily on the researcher. It also compels the researcher to connect to the spoken and intended meanings of research participants (Creswell, 2013). This purpose of this chapter was to discuss the methods used to capture, analyze, and draw conclusions about executive leaders in CAHSOs. This chapter also documented the tools and design of this study. The elements of this research design create a tremendous opportunity to capture accurate information about the field of focus.

# Chapter 4: Findings

Churches that have HSOs are rare. They are often disguised under the banner of faith-based organizations, churches, or other religiously associated nonprofit organizations. Consequently, the reality of their personnel and the narrative surrounding the experience of their executive leaders is hidden and under studied. Their specific experience appears marginally at best. Through the HSOs that are affiliated with a church organizations are mobilized that meet the needs of indigent populations ultimately combating poverty, unemployment, homelessness, hunger, and various other causes. The significance of their experience should not be overlooked.

Therefore, the purpose of this study was to determine the challenges that executive leaders face in CAHSOs, the strategies and practices they use to address these challenges, and how these leaders track the success of the solutions they implement. This study also determined what advice executive leaders give to emerging leaders in their field. Research participants were invited to answer the following interview questions, related to the corresponding research question:

- *RQ #1*: What challenges do executive leaders in church affiliated human service organizations face?
    - Interview question: What challenges do you face in leading your church affiliated human service organization?
- *RQ #2*: What strategies have executive leaders in church affiliated human service organizations devised to overcome these challenges?
    - Interview question: What strategies have you implemented to address the challenges within your organization?

- *RQ #3*: How do executive leaders in church affiliated human service organizations know if their strategies and practices are effective?
    - Interview question: What is your definition of success for your human service organization?
- *RQ #4*: What recommendations would church affiliated human service organization executive leaders make to professionals in the field?
    - Interview question: Share some of the main lessons you have learned as an executive leader in a human service organization.

The follow up questions included:

- Which of these challenges give you the highest level of stress?
- Describe your responsibility in the corporations or organization
- What is your normal response to challenges in your organization?
- What strategies have been most effective during your tenure as an executive leader?
- How do you know if your executive leadership strategies worked?
- How to you track your improvements or adjustments as an executive leader?
- Who is responsible for assessing the effectiveness of strategies and practices in your human service organization?
- What recommendations would you make to other leaders in your field?

These questions were answered in an environment and at a time most convenient to the research participant. Each participant permitted their responses to be analyzed through a transcription, theme discovery, and synthesizing process. The findings have been organized and reported in the following paragraphs.

**Participant Identification and Recruitment**

**Criterion for inclusion and exclusion.** This research project focused on the experiences of executive leaders in CAHSOs. The criteria for inclusion and exclusion included having at least 3 years of experience, being at least 25 years old, and holding or recently held an executive level position at a HSO that is affiliated with a church. Gender and race were not used as criteria for exclusion. Achieving maximum variance was an important goal in the study. Invitations were sent to specific participants using the purposeful sampling method.

**Participant recruitment process.** Research participants were recruited using two methods: personal network and the Google search engine. The researcher's personal network was developed throughout his 10-year employment history as a leader in a HSO that is affiliated with a church. In the event that the researcher's personal network did not yield an adequate number of participants with preferred diversity or variety, the Google search engine was used to yield the rest of the participants.

Persons of various races, cultures, and organizational missions received the first invitation to participate, as part of the purposeful sampling method. As research participants confirmed or declined to participate, the remaining list of possible research participants was duly modified. The purposeful sampling method included having an equal number of male and female participants. Executive leaders who held positions including COO, President, or Executive Director were preferable participants, however, other C-suite and Executive positions were considered and accepted.

The researcher successfully obtained the participation of 15 executive leaders from 11 different organizations. The participants ranged from 3 years to 25 years of executive leadership experience and displayed a wide span of ages from early 30's to mid 70's. The data, however, only reflected the participation of 14 executive leaders from 11 different organizations. After completing the interview and performing analysis, one of the research participants disclosed information that met criteria for *exclusion*. Consequently, the final findings were modified to exclude the data from the excluded research participant. A demographic breakdown of the 14 research participants is shown in Table 5.

Table 5

*Demographic Characteristics of CAHSO Executive Leaders*

| Characteristic | Number (%) |
|---|---|
| Gender | |
| Women | 6 (42) |
| Men | 8 (57) |
| Race/Ethnicity | |
| Hispanic | 3 (21) |
| Black | 10 (71) |
| White | 1 (7) |
| CAHSO Mission Focus | |
| Housing | 2 (14) |
| Food Services | 1 (17) |
| Youth Education | 1 (17) |
| General Financial | 1 (17) |
| Multiple Areas of Focus | 8 (57) |

*Note. N* = 14.

**Recruitment surprises**. There were two unexpected situations or surprises in selecting research participants. The researcher knew various people who had experience working in a CAHSO and expected to secure at least 10 research participants. Unfortunately, few of them met the criteria for inclusion for this research project. Fortunately, the Google search engine yielded 36% of the participants and fulfilled any unexpected participant deficiencies.

A second surprise was the emergence of participants who had executive positions and responsibilities but under a different title. For example, one of the research participants had the title *executive director of giving*. Another participant had the title of *director of fundraising*. Each of these people served as an executive leader but carried a title that was distinct among others in the field.

It is noteworthy to mention an unexpected but unavoidable adjustment that was made to accommodate one research participant. Due to travel and schedule conflict, one interview was conducted using the Apple/Mac application known as *FaceTime*. This application, using computers or phones, allowed the research to include a virtual interview including the same amount of recording devices and asked the same interview questions. A phone interview would have prevented the visual component of the interview therefore FaceTime was a better option. FaceTime allowed the researcher to gather similar unspoken communication while simultaneously gathering spoken feedback.

**Data Collection**

Upon agreeing to participate, each research participant received an email of gratitude, confirming his/her desire to participate (See Appendix A). Each research participant was invited to respond, confirming receipt of the email of gratitude. As each participant responded, a follow-up email was sent soliciting appropriate and convenient scheduling information (See Appendix C). After receiving the acceptance letter and interview location document from each research participant, the research questions were sent along with a corresponding calendar invitation.

Upon arrival at each interview location, the informed consent document was reviewed with particular attention to potential risks and discomforts as well as the audio recording and transcription process. Each participant, after reviewing these documents, granted his/her permission to proceed. The purpose of this process was to ensure that each participant was protected as required by the Institutional Review Board and Federal guidelines. After receiving final verbal consent, the interviews were recorded using three audio devices.

Each interview consisted of four main questions that each research participant was invited to answer. Based on his/her response to the main question, each research participant received one to three follow up questions related to each main question. The following main interview questions were used to collect the data:

- What challenges do you face in leading your Church Affiliated Human Service Organization?
    - Follow up questions
        - Describe your responsibility in this corporation.
        - Which of these challenges give you the highest level of stress?
- What strategies have you implemented to address the challenges within your organization?
    - Follow up questions
        - What strategies have been most effective during your tenure as an executive leader?
        - What is your normal response to challenges in your organization?
- What is your definition of success for your HSO?
    - Follow up questions
        - How do you know if your executive leadership strategies worked?
        - How do you track your improvements or adjustments as an executive leader?
        - Who is responsible for assessing the effectiveness of strategies and practices in your human services organization?
- Share some of the main lessons you have learned as an executive leader in a HSO.

- Follow up questions
    - What recommendations would you make to other leaders in your field?

Each main interview question was asked verbatim. When necessary, follow up questions were introduced casually. Occasionally main or follow questions were clarified at the request of the participant. However, during the first interview, the researcher realized the importance of hearing how a person describes his/her job responsibility before hearing the person's challenges on his/her job. Consequently, follow up question one in the first main interview question, was asked before the main question itself. This minor adjustment allowed each research participant to introduce his/her job function before reflecting on the challenges it presented.

After completing each interview, the audio file was transferred to a password protected digital storage device and uploaded to a password protected cloud storage application. Each audio file was also labeled, on the device and cloud application, for reference purposes during analysis. After storing and labeling each audio file, the interviews were transcribed, returned, de-identified, and prepared for analysis.

**Data Analysis**

Fourteen audio files were sent to a transcription service.  Simultaneously a Microsoft Excel document was created listing each of the research participants by name, contact number, position, organization, website, age, and years of experience. Each participant was assigned a code name, ranging from P001-P014.

The transcription service returned each audio file as an email with an attached word document. Each document was downloaded and carefully reviewed three times. During the first review the researcher:

- Eliminated identifiers.
- Renamed each document using the coded number that corresponded with each research participant.
- Highlighted keywords that appeared frequently.
- Generated keyword lists for each research participants responses related to the corresponding interview question. The initial list consisted only of words that appeared verbatim multiple times.
- Transferred information to a Microsoft Excel worksheet for organizational purposes.
- Created several worksheets in Microsoft Excel including:
    - Individual sheets for each research participant's keyword list related to the corresponding interview question.
    - A master participant sheet. This sheet included the list of participants and other demographic/organizational information including: real names and associated coded numbers, date of interview, age, tenure as an executive leader, website, name of organization, organizational focus (single/multiple), and position.
    - A master responses sheet as a space holder to be used only after each interview had been analyzed independently.
    - A master questions sheet, which was a database for the keywords from every research participant categorized by the corresponding interview question.

During the second review, the researcher:

- Reviewed each transcription document carefully for synonyms, phrases, or colloquialisms that were similar to the keywords that were highlighted during the first review.
- Added each synonym, phrase, or colloquialism from each research participant's transcription document to the corresponding Microsoft Excel sheet.
- Analyzed and categorized keywords into themes on Microsoft Excel sheets for each interview participant. Created a category for discarding less relevant content.
- Transferred the top three or four themes from each participant's Microsoft Excel sheet onto Microsoft Excel master responses sheet. Each theme was categorized according to the corresponding interview question.
- Consolidated and combined themes (and associated keywords) on master responses sheet to create first draft of master responses sheet.
- Compared themes on each individual research participant's sheet to the combined themes on master responses list to ensure accuracy and increase familiarity with the data.
- Sent Microsoft Excel master responses sheet to inter-rater reliability team for review.
- Saved and stored transcription documents on a password secure device.

During the final review the researcher:

- Revised Microsoft Excel master responses sheet based on feedback from inter-rater reliability team.
- Reviewed and clarified Microsoft Excel master responses sheet.
- Developed tables displaying results for each interview question on new Microsoft Excel sheet.

- Prepared to conclude data analysis.

The researcher listened to each audio interview before completing the data analysis process. Reviewing each audio files included listening for other influential information like pauses, breathing patterns, or length of time spent on a particular question. While this information was not used or recorded in the transcription services' document, connecting the audio to the transcription offered clarity during the analysis process. Ultimately, the data was analyzed, synthesized, converted into a table, and reported using a series of conclusive statements and their accompanying visual aids.

**Data Display**

**Research question 1.** Research question 1 asked: What challenges do executive leaders in church affiliated human service organizations face? To help participants respond to this question, they were invited to answer one question, which was accompanied by two follow up questions. Together, the three questions invited research participants to reflect on their position in the organization, the function or responsibility associated with their position, the inherent challenges that are associated with their position, and the challenges that causes the greatest level of concern. The exact question was:

- What challenges do you face in leading your church affiliated human service organization?

The follow-up questions were:

- Describe your responsibility in this corporation.
- Which of these challenges give you the highest level of stress?

More than 60% of the participants started their question with a deep breath and a preliminary comment that they face a lot of challenges. The data revealed that challenges for executive leaders of CAHSOs primarily related to five themes: (a) leader strain/personal leadership practice; (b) personnel, finance, and facility resources; (c) HR/leadership competency; (d) church and state/exemption requirements; and (e) church member expectations and management, as shown in Figure 2.


*Figure 2.* Challenges faced by leaders of CAHSOs.

***Leader strain/executive obstacles*.** The personal experience of the executive leader emerged as a great challenge in the research. When thinking about the challenges faced within their CAHSOs, all (14 of 14) research participants offered reflection surrounding the difficulty of their job. Responses ranged from difficult personal experiences to the unreasonable expectations of supervisors or other structurally significant personnel like board members.

Leader strain/executive obstacles, within this research study, is the category that communicates emotions, opinions, or experiences that increase vocational difficulty for executive leaders. Words or phrases in this category include hard decision-making, not enough time, no road map, and strained relationships. The data also revealed words that imply conflict between the executive leader of the CAHSO and the executive leadership of the church, like "the pastor's mindset" or "working with clergy." To further illustrate this point, P004 articulated the challenge of having split loyalty.

> You have typically board members who are church members so the conflict is, Am I going to be loyal to the chair of the board and do what I think is in the best interest of the board? Or is my relationship with the church and the pastor more important than this vote? So when you have these closely knit relationships it puts an undue burden not only on the executive, but in many cases those board members. (personal communication, February 25, 2016)

P005 perfectly articulated what allows him to avoid experiencing strain and obstacles:

> My job here is social economic development, which means enhancing the quality of life of everybody. And if you are a member of the church I can assist you as far as my organizational purpose is concerned. But I don't get in the ministry. I don't expect the church to get into economic development. (personal communication, February 26, 2016)

The rest of the research participants shared a broad range of other challenges that make their job difficult or create obstacles toward their completion of their responsibility.

***Personnel/finance/facility resources.*** After extensive review with the inter-rater reliability team, a collaborative or combined theme was suggested surrounding the inadequacy of people, financial resources, and space. Having a sufficient amount of these organizationally sustaining resources is a challenge for executive leaders of CAHSOs. Since each resource is paramount in running the organization, they were grouped together. Similar to the previous theme, the data revealed a 100% similarity among research participants' responses. Having enough money, having enough people, and having enough space were often the topic of the narrative when answering interview question 1.

Personnel/human/facility resources, within the context of this research project, refers to staff members, volunteers, money for operations or personnel wages, and adequate programming facilities. Words in this category include capacity, staff, salary, revenue, sustainability, limited, few, seasonal. Phrases in this category include non-competitive salary, low staff, sharing of space, and insufficient resources.

As an example of this theme, 86% of the research participants mentioned a lack of human resources and 76% of the research participants mentioned the need for more financial resources. Participant 003 captured this theme with the following statement:

> You are…you're raising money right for a small organization and you know you are doing the best you can with raise but you are also not able to pay top salary so then you have a hard time attractive all the highest quality of staff, the most well educated staff, the most well trained staff, and in some cases, it might even be the most passionate staff. So attracting that because of the capital access. (P003, personal communication, February 26, 2016)

The balance of the data revealed words related to general resource scarcity.

***Human Resource/leadership competency.*** Reviewing the data revealed another theme related to personnel skill. Nearly 93% of the research participants articulated a level of dissatisfaction with the performance of leadership and human capital within their organizations. The overwhelming data related to performance created a case for a legitimate category separate from HR. This category was necessary because human performance must have a distinct area for analysis.

Consequently, the HR/leadership competency theme, in this context, contains the words that evaluated, rated, or measured performance. Words in this category included hiring the right person, engaging board members, young staff, and ill prepared for business. In various ways, each executive leader was critical of staff, board members, and other organizational leaders.

To illustrate this point, 50% of the research participants, who had never met one another, specifically used the phrase “hiring the right person” to describe one of the challenges they face. The same percentage of research participants also mentioned a lack of business acumen as another competency issue. The following quote captures this theme. P002 stated,

> Too many people have too much low aim…Let me say it like Benjamin Mays said, former president of Morehouse College, ‘Not failure, but low aim is sin.’ So I tend to worry about whether we are aiming high enough. I don’t worry about failure as much. (P002, personal communication, March 4, 2016)

Other research participants mentioned staff performance more gently, accompanied by a desire to see more engagement from board members and volunteers.

***Church and state/exemption requirements.*** A main attribute of CAHSOs is their status as nonprofit organizations. They are able to function properly if their federal and state status is clear. A review of the data introduced the struggle executive leaders face when trying to maintain the organizations exemption status while maintaining a close relationship with a religiously exclusive institution; the Christian church.

Church and state/exemption requirements, for the purpose of this research project, deal with the paperwork, official operating mandates, federal approval, and policies that are necessary to be a properly functioning 501(c)3 organization. Words in this category include separation, legal, paperwork, structure, accounting, liability, and governance. Some research participants were highly critical of other similar organizations that do not understand the significance of this theme.

To illustrate this point, 64% of the responses used the phrase “separate” to discuss the relationship that their HSO has with the church. P002 clearly explained the challenge for executive leaders of CAHSOs as it pertains to this theme:

> So those are all the general challenges that go with any organization. Specifically though as a church based or faith-based group, you have the challenge of keeping a clear separation between that which is a religion or that which is faith oriented and that which is community or development or non-faith oriented because you are dealing with people who don’t have to embrace what you believe. (personal communication, March 4, 2016)

The rest of the participants mentioned governance, policies and procedures, and avoiding liability as lingering challenges.

***Church member expectations/management.*** The data revealed a nuance for executive leaders regarding the relationship and interaction with the membership of the church. The data revealed specific mention of church membership and their posture of engaging the CAHSO’s resources. For the research participants that did reference church member expectations/management as a challenge, their comments were similarly inclined toward unnecessary or unmerited expectation or entitlement.

Church member expectations/management, in this context, deals with the opinions, approaches, and privilege of church members that receive services from the HSO that is affiliated with the church. Words and phrases in this category include entitlement, they just don’t know, hook up, and assumptions. P003 best illustrated this theme in the following comment.

> The third area that pops out is the very high expectations among church members about what they expect as far as preferential treatment. So as a nonprofit organization you have a responsibility to support the public good whether they are saved not saved, members

> not members and that's often very difficult for members of a church to understand, that they may not be first in line and that they may not receive the most benefit because they are members and that there is a larger common good that the organizations is seeking to achieve. (personal communication, February 26, 2016)

***Summary.*** When asked about the challenges executive leadership face in CAHSOs, the research participants offered information in five areas that communicated difficulty dealing with the demands of their position. They described challenges associated with the lack of human, financial, and facility resources. They communicated the difficulty of having undertrained, underperforming staff while lamenting the fact that limited financial resources make it difficult to recruit or retain people who have the skill to do the jobs effectively. They communicated challenges with making sure the organization is operating with legal integrity as a federally and state-acknowledged nonprofit. Lastly, they communicated challenges with managing church members who have a false set of expectations about the role of CAHSOs and the benefits congregation members feel they are owed because of their relationship with the church.

**Research question 2.** Research question 2 invited participants to consider the strategies they use to remedy the challenges they experience as executive leaders of their organization. The interview and follow up questions that were used to gather data for this research question invited each research participant to consider the way he or she responds personally to organizational challenge, the unique strategies he or she has used to remedy the challenges he or she faces, and the adjustments of which he or she was most proud. The exact interview questions were:

- What strategies have you implemented to address the challenges within your organization?
- What strategies have been most effective during your tenure as an executive leader?

- What is your normal response to challenges in your organization?

The data indicated that executive leaders implement myriad strategies when they face challenges. These responses fall into five general categories: (a) systems and infrastructure, (b) benchmarking, (c) personal/religious response, (d) build/strengthen auxiliary, and (e) organizational growth, as displayed in Figure 3.

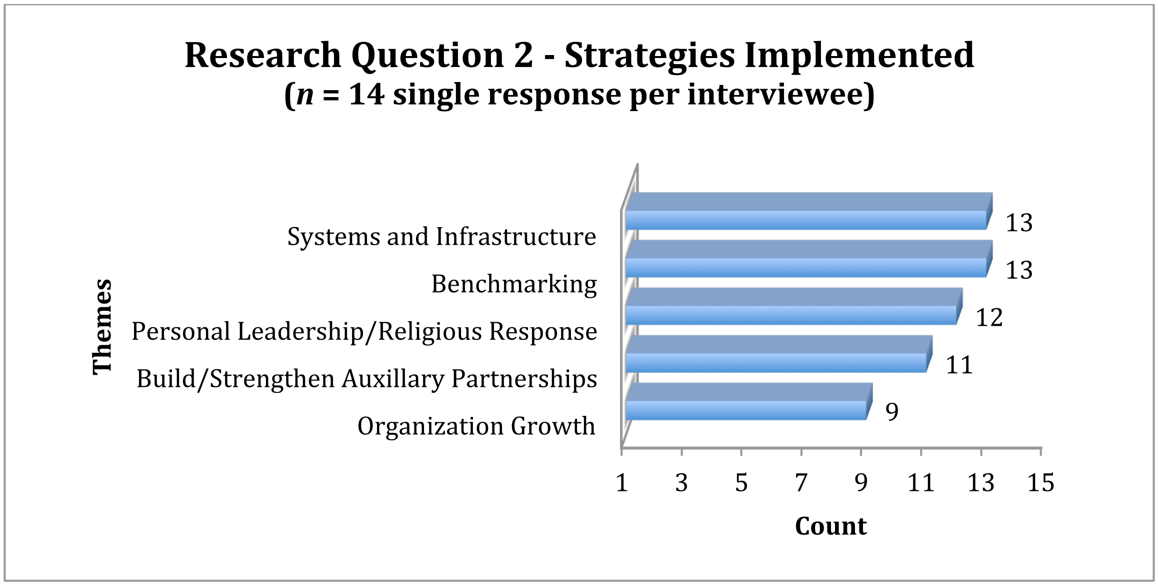


*Figure 3.* Strategies used by executive leaders to remedy challenges.

***Systems and infrastructure.*** Systems and infrastructure is a theme that refers to the establishing of processes that will help the organization function more effectively. When considering how executive leaders of CAHSOs respond to challenges, systems and infrastructure emerged as a significant category. The data revealed a broad range of responses related to the lack of systems and infrastructure.

Systems and infrastructure, for the purposes of this research, include words that articulate the organization's need to function smoothly and professionally. Many of the responses deal with the organization's ability to manage large processes, perform business functions efficiently, and manage employment processes with a level of professionalism. Words in this category include bylaws, training, policy, process, and organization.

Some research participants mentioned the implementation or development of processes as the solution to challenges in the organization. To illustrate this point, three of the 14 (21%) participants mentioned establishing by-laws specifically as a response to challenges in the organization. The following two statements capture the essence of this theme. P002 stated,

> Well you have to talk about the church generally. Churches generally are not good at doing business. African American churches specifically are not good at it because they don't build infrastructure as a part…they don't make infrastructure fundamental to their organizations. (personal communication, March 4, 2016)

P005 said, "Do you have the infrastructure? Do you have 3-5 years of financials so you can show your stability and your existence and documentation? Can you show and highlight data" (personal communication, February 26, 2016)?

Other participants mentioned establishing other written forms of accountability for personnel like attire and management agreements. More interesting was the focus on improving personnel infrastructure through development and training; 43% of the research participants mentioned investing in intentional professional development for the staff or board members.

***Benchmarking.*** Finding a way to track the performance of the organization at various levels emerged as frequently as the previous theme in the data. There were several ways to label this category; however, benchmarking was deemed most accurate. Benchmark is a term typically used in business circles to mean "a point of reference from which measurements are made" ("Benchmark," n.d., para. 2) For the purposes of this research, benchmarking includes the methods and paperwork that helped the executive leader to understand what was going on with the CAHSO. Words in this category include reports and meetings.

The data were very clear that meeting and reports was an important reference for research participants. For example, P002 stated,

> I strongly believe in measure and report, measure and report…so there is somebody every week gathering data and compiling it, either into a weekly report or a monthly report. Eventually that data gets summarized to me and I prepare a monthly report at least to the leadership of this church. (personal communication, March 4, 2016)

The rest of the research participants echoed a similar sentiment. In fact, 79% of the research participants that gave direct feedback about benchmarking used the exact word "meeting" or "report."

***Personal leadership/religious response.*** The data show that executive leaders of CAHSOs have unique ways of responding personally to the challenges they face. Such responses included general leadership preferences and reliance upon religious tools during times of difficulty. These two themes can stand alone. However, after consulting with the inter-rater reliability team, the personal implications were deemed too similar not to combine these categories.

Personal leadership/religious response, in this context, refers to those strategies that impact how an individual responds to a particular challenge. These responses are uniquely related to the leader. Words that fall into this category are listening, autonomy, take risks, be flexible, pray, seek advice, take time, and include the CEO.

To illustrate this point, 43% of the responses included leveraging religion or prayer as a response to challenges. While considering response to challenges, P006 captured a main ingredient of this theme:

> Well number one I pray to Jesus. I do. Because I always have to remember that I am dealing with people and with emotions and you have to be careful there because as much as you always want thinks to be, in my case you know I am very…I do run a tight ship I am very loving and kind but I do run a tight ship and so I always have to remember that that is not more important that the person, for myself. And so I always have to ask the Lord to help me. To make sure that I am being balanced. (personal communication, March 11, 2016)

P001 offered a less religious response to the same question:

> The first thing that I do is listen. In most instances you have to understand people just want to be heard. I don't passively listen, you have to actively listen and that means repeating back to them what they have said and assuring them that they have been heard. (personal communication, March 4, 2016)

The common strand in the data reveals implies an adjustment to the leader's actions, thoughts, or decisions. This commonality made it easy to include religious responses and personal leadership in the same category.

***Build/strengthen auxiliary relationships.*** Some executive leaders shift their energy to external or supportive relationships when facing certain challenges in CAHSOs. Because this factor surfaced in the data, *building/strengthening auxiliary relationships* became a theme. As research participants considered how they respond to challenges, some lamented the absence of certain relationships that would be beneficial. The term auxiliary is a strategic word used to describe external (non-staff or internal volunteer) relationships that exist to supplement or subsidize the efforts of the CAHSO.

Build/strengthen external relationships, in this research project, refers to words that communicate the importance of external reputation and relationship. Words in this theme include reputation, peers, marketing, proposal, partnership, and leveraging. Twenty-nine percent of the research participants encouraged hosting events that strengthen client/community partnerships or strategic visibility as a solution to problems. P005 articulated this theme as he referenced an external relationship that is valuable to his organization; “You know working with them for 18, 24 months, going to meetings, galas, and doing a logic model and stuff, you know, this is time! So boom! One hundred fifty thousand for 2 years” (personal communication, February 26, 2016).” P007 captured this theme as she articulated concern for the church congregation.

> We don’t want to continue to strap or tax the membership and if we can get some donations from the outside like the LA Regional food bank and other donations from other groups then that’s the best way to grow that program. (personal communication, March 21, 2016)

Other participants encouraged strategic civic relationships or intentional relationships with other similar organizations as a solution challenges.

***Organizational growth.*** Some executive leaders proposed organizational growth as the solution to challenges CAHSOs face. Organizational growth in this context deals with the intentional decision to hire staff, recruit more volunteers, strengthen boards of directors, or contract support services to improve their organizations. All these words deal with the strategic growth and leveraging of human capital. Words in this category include hiring, recruiting, and supportive.

This theme was the least dominant in the data, but 64% of the research participants considered this as part of their strategy to remedy certain challenges in their organization. This importance of this theme as a solution to challenges is embodied in the following comment made by P012:

> Fund development and fundraising is largely relationship building. Which is what makes it difficult because relationship building is time consuming. That could be my only job and that really should be my only job. Is running around building relationships to foster a resource rich environment. (personal communication, March 11, 2016)

Forty-six percent of the other research participants used the word *hiring* when suggesting how the organization can grow. The balance of research participants suggested growing the organization through the expansion of volunteer positions like board membership.

***Summary.*** The data revealed that executive leaders respond to challenges in their CAHSOs in five different ways. The two most important ways are adding infrastructure or systems and benchmarking, both of which contribute to an increase the amount of written documentation. The data revealed that these themes were equally significant in the eyes of these research participants.

Closely related is reliance upon personal leadership practice and leveraging religious tools to support grounded decision making. An investment in building or strengthening external relationships was the next remedy that the data revealed for some of the challenges expressed in interview question 1. Lastly, the data showed how participants suggested internal organizational growth (hiring/training staff or increasing board members) as an important response to challenges within the organization.

**Research question 3.** Research question 3 invited participants to consider how they define success for their organization. In order to answer this question, participants were challenged to reflect on the processes they use to track their success, the performance of personnel in their organization, and the aspects of the organization that are most valuable to them, with respect to their responsibility.

The majority of their responses related to two areas: program outcomes and money. However, two other areas were considered important to the research participants, namely network strength/external reputation and program mastery/staff buy-in as shown in Figure 4. The exact interview question was:

- What is your definition of success for your HSO?

The follow up questions were:

- How do you know if your executive leadership strategies worked?
- How to you track your improvements or adjustments as an executive leader?
- Who is responsible for assessing the effectiveness of strategies and practices in your human services organization?

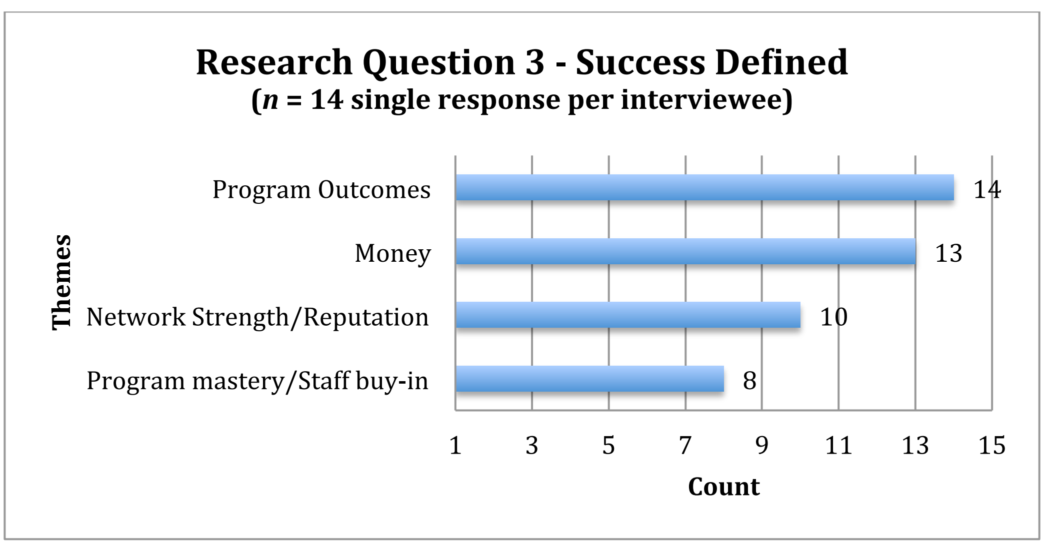


*Figure 4.* How executive leaders define success in CAHSOs.

***Program outcomes.*** The definition of success for research participants dealt heavily with program outcomes. Participants described myriad program metrics when trying to define success. Consequently, much of the data relate to the goals of specific programs. The data in this category related to the impact a program had on clients, communities, or an individual's personal life.

Program outcomes, for the purpose of this research, include the various terms that define the tangible impact a program had on the audience it engaged. Every metric that the executive leader recalled about a particular program was placed under this category. Words that fell into this category include data, percentages, impact, families, goals, stories, numbers, measurements, and completed.

There are several ways to capture this theme in this category. For example, P002 discussed the importance of tracking program outcomes:

> So the more you can measure and record in a consistent way over time you generally have something to compare to. So measurements we started taking 3 years ago are now compared to the measurements we would take today and we can see if we have grown by any percentage and that's how I measure success. Have we grown in the key categories by a percentage that lets us celebrate with our audience our constituents that growth. (personal communication, March 4, 2016)

Participant P008 more specifically captured the theme thusly:

> For me, when I saw that first group of kindergarteners go through all those years and graduate from high school and go into college and be successful in college, that for me was because it wasn't just about those kids but it was about those families being ready to let those kids go to college. (personal communication, March 16, 2016)

The majority of participants provided data to support this theme. Eighty-six percent of the research participants used the words goals, numbers, or data when answering this interview question. The same ratio of participants used words referring to people who participated in the program being hosted by the CAHSO. The data revealed that most research participants unknowingly offered similar responses when endeavoring to verbally define or describe success for their organization.

***Money.*** In a fairly dominant and significant way, the data on this question produced a strong theme surrounding money. Whether spoken about using a intentional words or addressed implicitly, the data communicated a deliberate relationship between the definition of success and money, finances, or cash flow. Money, in this context, is the category that encompasses all references to the state of the organization's bank account, monies received, monies requested, and monies withdrawn. Words in this category include finance, raised, grant, profit, loss, partnership, deals, spent, and funding.

Three participants offered commentary that strengthens the validity of this theme. P006 captured this theme by stating, "Well in my department specifically obviously success is defined by you being able to fully fund your programs, being financially stable and sound" (personal communication, March 11, 2016). P003 said,

> I put the organization in a much stronger financial position as a result of those. I was able to raise the credibility of the organization among key funders who were then willing to give in excess of six figures a year. (personal communication, February, 26, 2016)

Participant P010 asserted, "When we have enough funds to pay all our vendors and still have some funds left to grow the organization. That's a success" (personal communication, March 11, 2016).

Money is, without question, a dominant theme in the data and an important part of the definition of success. Furthermore, the other research participants referenced money as it relates to their organization's amount of income, whether annual, seasonally, or otherwise. Because money appears so prevalently in the data, it is difficult to overstate the role it plays in the executive leaders definition of success.

***Network strength/reputation.*** The data reveal that success for executive leaders of CAHSOs is closely associated with the number and perceived value of relationships that are initiated or maintained. Success is also related to how outside people, organizations, or leaders view the organization. Network strength is the phrase used to define the number of people that support or advocate for the organization. Reputation is the word used to designate how external parties view the organization. Network strength/reputation, for the purpose of this research, captures the words that imply relationship with external organizations and personnel. Words in this category include political, database, community, partnership, and civic. The following excerpts capture this theme. P006 stated,

> Being endorsed by other colleagues and partners in the community. To me that's one of my greatest successes because you just never know what is going to come, what's going to be around the corner somebody tells somebody else about you or just says what a great job you are doing. (personal communication, March 11, 2016)

P013 said, "But I think the community leaders seeing us as trustworthy…you know giving testimony…wherever they go they are talking about us we're not tooting our own horn" (personal communication, March 16, 2016).

The other research participants referenced partnership as a sign or definition of success. There seems to be an enhancement of the value of the organization's brand, and implication of success, when the executive leader maintains influential relationships. This category was not the most prevalent in the interview results; however, the majority of participants considered network/reputation to be important.

***Program mastery/staff buy-in.*** The conduct and performance of the staff also emerged as a theme when executive leaders of CAHSOs attempted to articulate their definition of success. Program mastery is a term used to define the familiarity and excellence associated with the regular rendering of a particular program or process. Staff buy-in is a phrase used to designate the engagement style of employees related to a particular program and overall mission. These combined themes, for the purposes of this research, are meant to capture the words that imply engagement, communication, staff/leader feedback, and commitment to excellence among team members. Words in this category include process, timeline, enthusiasm, moral, transparency, efficiency, and improvement.

Program mastery/staff buy-in was evident, as 47% of the research participants reflected on the impact of staff performance or engagement on their definition of success. P011 even used the word *family* to refer to the definition of success as it relates to staff and leaders in the organization. The following series of comments embody this theme. P007 addressed how staff members reflect the theme:

> When they feel like they're empowered to bring up subjects that we need to consider or ways that we can improve our delivery then that's a success because number one all the answers should not come from me all the ideas should not come from and shouldn't just come from the board either. (personal communication, March 21, 2016)

P006 discussed how board members or donors, as volunteer stakeholders or volunteer leaders, can embody this theme, stating, "So with my donors I always stress that that to me is success when you can passionately talk about our organization and share with somebody else why you believe in us and why you support us" (personal communication, March 11, 2016). P010 articulated the theme within the context of a group effort:

> When we finish a major event where we've got to mobilize people where we've got to make sure the facility that we give the event in is set up on time, people are in place, and what ever we decided were the goals for attendance have been met. That's a success. (personal communication, March 11, 2016)

Other participants remained silent or implicitly address the importance of staff buy-in.

***Summary.*** Executive leaders base their definition of success on four areas. The largest and most clear definitions of success fall under two categories: program outcomes and money. Executive leaders look at the number of attendees and program results relative to the program's initial goals to evaluate success. They also combine this definition of success with an assessment of the CAHSO's finances. Executive leaders of CAHSOs consistently review profit and loss statements to ensure the financial stability of the organization. Lacking operational funds and overspending is a threat to the organization's definition of success. Both program outcomes and money carry great significance for executive leaders of HSOs that are affiliated with churches.

The data also revealed network strength and reputation as a measure of success. Some executive leaders assess their success based on the interactions, relationships, and reviews that occur among people in their organizational network, excluding staff, the executive board, and the church congregation. Valuable relationships (that qualify as a measure of success) include civic and political leaders. Being reputable includes listening for how others introduce the CAHSO and listening for stories about how others heard about one's organization. These definitions of success make up the bulk of the data gathered related to research question 3 and its subsequent interview questions.

**Research question 4.** Research question 4 offered an opportunity for the research participants to summarize their experience into feedback for current and future executive leaders of CAHSOs. In order to collect these data, research participants were asked an open ended question that invited them to articulate the lessons they how learned and how those lessons incentivize their advice to others in the field.  The data revealed feedback in three areas: (a) professional/business principles, (b) nature of the work, and (c) people and vision, as displayed in Figure 5. The exact interview question was:

- Share some of the main lessons you have learned as an executive leader in a HSO.

The follow up question was:

- What recommendations would you make to other leaders in your field?

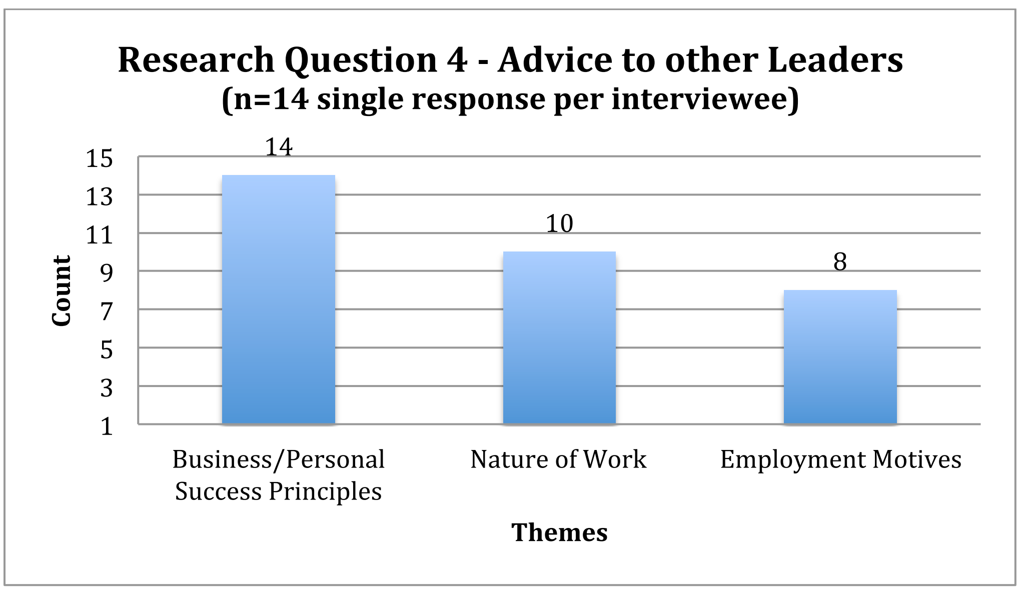


*Figure 5.* Recommendations from executive leaders of CAHSOs.

***Business/personal success principles.*** When considering the advice that executive leaders would give to aspiring leaders in the CAHSO field, the data reveal a heavy reliance upon business or personal success principles. Business principles refer to the language that connotes business practices, whereas personal success principles connote habits of successful people related to managing and leading others within an organizational context.

Business/personal success principles, for the purpose of this research, capture the terms that holistically inform how an executive leader manages people and his/her own actions in a successful organization. Words in the category include give, value, edify, talk, lead, respect, reflect, and honest. Related phrases address the importance of teamwork, seeking counsel, managing emotions, and researching the industry. P002 offered three different pieces of advice that capture the theme accurately: “Don’t take other people too seriously, don’t take yourself too seriously. Credibility is key;” “Borrow! Borrow! Borrow! You ain’t gotta reinvent no wheels at all;” and “And God forbid, comply with the general rules of society (personal communication, March 4, 2016).”

To further reinforce this theme, 86% of the executive leaders gave advice about managing oneself. Seventy-nine percent of executive leaders gave advice about managing one’s staff, and 71% of executive leaders offered advice about managing the organization. Every piece of advice given by participant P007 was related to this theme. The rest of the executive leaders gave advice to remain knowledgeable concerning the industry and generally make decisions that preserve one’s own health.

***Nature of work.*** The next most significant piece of advice that executive leaders gave to others in the field was about the general conclusions they have drawn about their work. It was difficult to capture specific words and articulate a theme. However, the experiences that are a natural, normal, or unavoidable part of working as an executive leader in a CAHSO proved to be an accurate theme for this portion of the data. Nature of the work, as defined in this research project, refers to the impact that this work has on a person's individual experience. Words or phrases in this category include pressure, hard issues/decisions, leaders, challenge, sacrifice, and stressful.

P003 clearly articulated the foundation of this theme in the following comment. "I think people underestimate how difficult it is to be an executive director…in general. It's a…umm…You are everything to the organization. You have all levels of responsibility" (P003, personal communication, February 26, 2016). P002 also noted,

> People who come to work for a faith-based institution they may even come to work for that institution with the assumption that they don't have to work as hard. So you have to debunk them of that notion. You gonna work twice as hard for half the money. (P002, personally communication, March 4, 2016)

This theme is also easily seen in the fact that 64% of the research participants used language that suggested personal difficulty or pressure. P001 used the phrase "lots of work with little reward." P010 said, "Personal relationships may suffer." P008 advised, "Make sure you take care of yourself." These are the statements of executive leaders who feel strongly about the nature of their position.

***Employment motives.*** The least frequently given yet most subtle advice that executive leaders gave to others in their field was about employment motives. This term is used to address the reasons why an executive leader would work for a CAHSO. For the purpose of this research project, the category of employment motives references phrases and words related to executive leaders' motivation for working at their organization. Words or phrases in this category include community, people, God, vision, calling, values, and mission. P012 gave a perfect expression for this theme in the following comment:

> One of the main lessons I learned is you do have to love, you have to love your population. You have to love what you are trying to accomplish for that population. You have to be passionate. You have to be passionate about what you do because, often times, you can go somewhere else and make more money so it can't…you are not in this because you want to make all the money in the world because it's just not that kind of a game. (personal communication, March 11, 2016)

The rest of the executive leaders who considered this theme important used words like vision, mission, calling, or purpose.

***Summary.*** The lessons for executive leaders of CAHSOs emerge out of their personal principles and business acumen. Research participants gave the greatest level of feedback in these areas. The next lesson emerged out of the executive leader's' emotional, physical, and psychological experience on the job. Working at a CAHSO comes along with byproducts, including feeling overworked and feeling underpaid. Research participants disclosed the difficulty of their jobs to offer insight to others about their experience. The final lesson surrounds the reason why one works as an executive in a HSO that is affiliated with a church. For these executive leaders, the only reason one works in this field is for the love or divine calling to serve people who are suffering.

**Overall Summary**

Each research participant was asked to respond to four main questions. They were asked to allot time on their schedule for an in-person interview that would be recorded using three audio devices. The researcher facilitated the interview, captured the audio, transcribed the files, organized the data, analyzed the data, and split the data into understandable themes.

Every research participant received a list of four main questions, consent forms, and other necessary information. Each research participant participated in an interview for more than 60 minutes.  Research participants were allowed speaking freely. However, they were intentionally reminded about the scheduled remaining time toward the final 20, 10, and 5 minutes of the interview.

The data analysis yielded 17 cumulative categories from the four main research questions. Leaders in CAHSOs face various challenges, such as official organizational paperwork, competency and effort of staff, lack of resources, and entitlement mentality of church members. Executive leaders respond to these challenges by increasing accountability, building infrastructure, asking for reports, and building relationships with other resourceful organizations.

Success for executive leaders in CAHSOs is based on their ability to produce outcomes that benefit the community and raise money. Certain definitions of success are universal for executive leaders. Less universal definitions include network strength/reputation and staff buy-in. Some executive leaders attach the state of their reputation to the performance of the organization. Subsequently, the failure of the organization represents the failure of the executive leader. Other executive leaders challenge their staff to exist within and embrace a culture where feedback is mandatory and ownership is key.

Overall, the data from these interview questions will be used to answer four research questions concerning the experiences of executive leaders in CAHSOs.  The categories were established in this chapter. In the following chapter, the data will be interpreted in the context of the research in order to arrive at some opinions or conclusions.

## Chapter 5: Conclusions and Recommendations

CAHSOs play a significant and necessary role in the life of suffering communities, although their impact is often difficult to quantify. This difficulty is partially due to literature that attributes this work to churches or faith-based organizations, in general. For example, Cunningham, et al. (2011) and Adedoyin (2013) documented the work of several churches and their work to provide HIV. Lancaster et al. (2014) addresses how churches work to combat obesity. Goodwill (2015) and The Salvation Army (2015) are well known for their ability to provide jobs, provide clothing, offer training, and care for people who lack.

Yet, socially, economically, and psychologically, indigent communities receive life-sustaining support, often times solely because of the successful existence of HSOs that affiliate with a church and the diligent work of their executive leaders. Their organizations and leadership continues to be overshadowed by literature about churches and faith-based organizations. Accordingly, the purpose of this study was to determine the challenges that executive leaders face in CAHSOs, the strategies and practices they use to address these challenges, and how these leaders track the success of the solutions they implement. This study also determined what advice executive leaders would give to emerging leaders in their field.

The importance of this study was magnified due to the state of research about these types of organizations. As mentioned previously, the narrative and experience of executive leaders in CAHSOs is typically blended into general literature about faith-based organizations. Consequently, the keys to successfully leading HSOs that are affiliated with a church and understanding the leadership strategies they implement remained a mystery.

The results of this study revealed a unique set of experiences for executive leaders of CAHSOs. The results highlighted leadership practice, organizational obstacles, and other aspects that are a priority for the executive leader. The results revealed strategies, measurements of success, and general concepts about achieving success in CAHSOs. These results verified some of the experience articulated by scholars who study faith-based organizations and their leadership. The results also introduced many leadership themes that contribute to the growing body of information in this field. This chapter introduces the results of a thorough analysis of the data, how these results might be used to effect change, and opportunities for more specific research.

**Challenges Executive Leaders Face in CAHSOs**

Executive leaders of CAHSOs faced a variety of challenges. A thorough review of the data revealed challenges in five areas, including relationships or encounters with church members, federal and state nonprofit standards, lack of resources, incompetent team members, and the difficulty that accompanies their position. Generally, the analysis revealed that the research participants face challenges in three different dimensions: people, priority, and sustainability.

**People.** The executive board is made of people and they are often responsible for the organizations success (Duta, 2011). Consequently, when trying to lead the organization, board members or executive leadership has the potential to introduce challenges. This was evident in the research results. This often manifested in phrases like “split loyalty,” “the pastor’s mindset,” or “resistance to change.” Understanding an organization often requires great analysis and in-depth knowledge about the organization’s leadership practices (Sturm et al., 2011). In reviewing the data, leaders were challenged by church membership and their inability to comprehend the complexity of leading the organization. Focusing and trust amongst members who support the organization are also challenges that executive leaders must face (Smith & Nelson, 2005). The data showed executive leaders that faced challenges with underperforming staff members, disengaged board members, and other low contributing people that are associated with the CAHSO. Furthermore, qualified personnel and preferred skills sets is an important part of the process of choosing people to work in or lead your organization (Hoefer et al., 2013). The data showed several executives valuing qualified personnel instead of merely available personnel.

**Priority.** A key skill for executive leaders is the ability to make rapid decisions on behalf of the organization (Harris, et al., 2006). However, some organization might lack the capacity to make proper decisions and should not be entrusted with more responsibility (Fischer, 2004). In reviewing the data, executive leaders struggled to prioritize challenges, as they often had more work than they could manage well. They faced increasing numbers of church members who sought social services or other needs. Staff accountability and executive board reports were also part of the research participant's regular task list.

All of these responsibilities are often wrapped into one person's responsibility. P005 used the phrase "too much work." P006, P012, P009, and P014 used the phrases "making hard decisions" and "many tasks" to describe their challenges with prioritizing. The research revealed words that imply stress, impossibility, or unreasonableness to describe the work experience or expectation. Finding support or help is often a challenge (Warner et al., 2011). In 2013, The U.S. Department of Labor, Bureau of Labor Statistics (2015) reported a decline for the first time in 10 years (para.1). Often confronted by lack of supportive staff, prioritizing became a significant challenge for executive leaders of CAHSOs.

**Sustainability.** Fundraising plays a major role in the evaluation of every executive leader (Jurkiewicz & Massey, 1998) Funds must be raised to continue operating the organization. Many non-secular or faith-based organization use government funding to address sustainability concerns (Guellich, 2002). There have been efforts to address these sustainability concerns through federal initiatives that encourage secular and religious partnerships (Anderson, 2009; Boodie et al., 2008; Daly, 2013). Despite the existence of resources through the government, data analysis revealed that executive leaders of CAHSOs face the challenge of sustainability. In analyzing the data, financial sustainability was a consistent concern for the participants.

The ability to comply with federal and state mandates for nonprofits in good standing was another finding. While Frederick (2003) was concerned about violating First Amendments Establishment Clause, executive leaders were simply concerned about making sure their paperwork was correct. Fear of being assessed or audited was communicated as a challenge and a threat to sustainability.

It is the executives' job to consider internal and external factor in order to guarantee sustainability (Heimovics et al., 1993; Jurkiewicz & Massey, 1998). The data communicated a general goal of creating or maintaining a thriving, well-staffed CAHSO accompanied by a healthy leader and supporting team. The bulk of the data pointed to this fact. Having sufficient resources, being in good federal/state standing, having enough personnel, and having supportive staff are all elements that, when absent, make it difficult to operate at a optimal level.

**Strategies Devised to Overcome Challenges in CAHSOs**

**Implementing various strategies.** The study of leadership offers thousands of years of models, failures, and solutions (Hussain & Hassan, 2015). Recently, there has been an explosion of materials published on leadership (Kumar et al., 2014). Effective leaders create learning organizations and learn from their mistakes and challenges (Senge, 2006). They also prioritize vision, encourage innovation, and allow managers or other staff for implementation (Domnica, 2012; Reynolds & Warfield, 2010; White, 2005). Seemingly, each research participant experienced the need to have more than one solution to his or her organizational challenges. The amount of strategies is possibly related to the different strength and weakness of each CAHSO. It certainly aligns with the history and evolution of models of leadership (Northouse, 2012). Yet, the data revealed common responses within each participant's feedback. Their responses were categorized into five areas, including systems and infrastructure, benchmarking, building/strengthening auxiliary relationships, personal leadership/religious response, and organizational growth.

**Generating paperwork.** Small faith-based organizations struggle with systems and reporting procedures in relation to their larger counterparts (Clerkin & Grønbjerg, 2007). Generating large volumes of paperwork introduces a dilemma for many faith-based organization (Guellich, 2002). However, the data revealed the bulk of strategies for overcoming challenges being related to the generation of paperwork. Creating systems, policies, procedures, and rules was one of the strategies that executive leaders used to solve their organization's problems. One of the participants even suggested, "Give the people paper" (P014, personal communication March 21, 2016). The data did not indicate difficulty with or resistance to producing paperwork or establishing systems.

**Assessing strengths and weaknesses.** However, similar to the literature, executive leaders did gather documentation as an explanation of the organization's strengths, weakness, opportunities, and threats. Strategies to remedy the challenges in CAHSOs were tied to the executive leader's ability to accumulate evidence or records. Larger organizations, like the Salvation Army, Catholic Relief Services, and Catholic Charities, have efficiently and effectively implemented systems and documentation processes (Guellich, 2002). A review of the data showed that research participants strove toward the same level of mastery and implementations with hopes of using these systems to evaluate success and solve problems.

**Using ability to influence.** Leadership surrounds an individual's ability to lead a group or organization to a common goal (Hussain & Hassan, 2015; Northouse, 2012). Possessing executive presence increases the ability of the leader to move people toward a common goal (Long, 2009). The final part of the analysis, surrounding overcoming challenges in CAHSOs, pointed to the executive leaders ability to move or collectively organize, mobilize, and be a catalyst or spark for the organization. The majority of the responses spoke to the executive leaders' ability to build or influence internally and externally. Executive leaders must assess their impact within the organization, which may require introspection, understanding, and delegation (Carrasco, 2010). The data revealed the need for executive leaders to assess their own thoughts and motives. Many responses indicated the participants pray or listen to gain clarity as strategy for making internal changes. These actions impacted the leaders decisions and shaped their ability to move the organization and its supporters in a positive direction.

## Organizational Definition of Success

Sometimes faith-based HSOs are viewed as successful based on the failure of the public sector (Hula et al., 2007). Secular and faith-based organizations are viewed similarly among patrons in the same community (Chavez & Tsitos, 2001; Graddy & Ye, 2006) This is not an accurate account of success because most faith-based HSOs have not successful submitted documentation or kept metrics that prove their success (Fischer, 2004). The data revealed that executive leaders assess their effectiveness by looking at four main categories: program outcomes, money, network strength/reputation, and program mastery/staff buy-in. All these categories surround the task of evaluating success. The success of the HSOs depends on the performance of the Executive leadership (Duta, 2011), including their ability to build relationships, measure performance, and achieve organizational goals.

**Building relationships.** The character and values of the leading executive impacts the relationships they build with the staff (Giberson et al., 2009). Executive board members depend on the executive leader to build the relationships that will lead to success, both internally and externally (Heimovics, et al., 1993; Jurkiewicz & Massey, 1998). In analyzing the data, successful executive leaders built relationships with other people and other organizations. For example, program outcomes were a direct product of engaging others. Successful fundraising was an indicator of relationship and engaging others. Professional network strength was the consequence of engaging others effectively. Staff buy-in partially deals with the executive leaders ability to win the commitment of other team members and a key responsibility of executive leaders (Harris et al., 2006). Each category from the data required executive leaders, and the CAHSOs they lead to, engaged with other people or organizations.

**Quantitative measurement.** Forbes created a 2015 list of top charities based on the amount of revenue raised, some of which were faith-based (Barrett & Novack, 2015). The Salvation Army (n.d.), Goodwill Industries International, Inc. (n.d.), and Food for the Poor (n.d.) each boast annual revenue in excess of 1 billion. Executive leaders are evaluated quantitatively, especially in the area of fundraising (Jurkiewicz & Massey, 1998). The data analysis also revealed that executive leaders of CAHSOs measure their effectiveness quantitatively. The majority of the data in this category had a value or number attached. The number of people attending a program, the amount of money raised or remaining, and the number of people in one’s network were all quantitative metrics of effectiveness. If these numbers were not high enough the resulting assessment was a lack of effectiveness. P005 spent part of the interview presenting a 10-year history of finances that was tracked as a way of evaluating the organization. P011 presented an annual report with noticeably larger emphasis placed on the content that described numbers of people impacted or funds raised. The unprovoked actions of P005 and P011 demonstrated that the information they both shared about their organizations was a tool for communicating effectiveness.

**Goals and plans.** Bolman and Deal's research describes effective or successful leadership as an act or something that you do. Effective or successful leaders have the ability to plan and communicate that plan to others (Omran et al., 2009). They are focused on the future and motivating followers or managers to get to that future (Kouzes & Posner, 2012). While implementation is left to manager, effective leaders communicate the plan (Kotter, 1990; White, 1990).

The data painted a picture that focused on goals and plans. Each of the executive leaders compared their performance to the goals they set as a means of evaluating effectiveness. Executive leaders of CAHSOs did not evaluate their effectiveness based on other organizations' goals. Rather, they established a plan and support their team, ensuring that their organizational plans came to fruition. These executive leaders used various checkpoints to evaluate progress. These actions still required executive leaders to focus on the goal or plan to evaluate effectiveness.

## Recommendations for Other Executive Leaders in CAHSOs

There are various articles that offer insight on leadership theory or the proper leadership style (Lynch, 2015; Mary, 2005; McCarthy, 2014). There are also various books that suggest document one leaders opinion about how to be the most effective leader (Bryant, 2009; Cashman, 1998; Jones, 2001). Leadership is contextual and cannot be properly assessed without considering the relationship between leader and constituents (Bolman & Deal, 2013). The data revealed a myriad lessons and advice to share with other leaders in the field. These lessons espoused three recommendations: demonstrate leadership, accept leadership philosophy, and seek knowledge.

**Demonstrate leadership.** The research results aligned with the literature that defined the executive leader as a visionary or influencer. Vision, communication, and influence are primary trait of a leader (Kotter, 1990). The research responses showed similar and verbatim words including study, learn, communicate, and motivate. After a thorough review of the data, it was apparent that the participants agreed with some of the popular literature surrounding the role of the executive leader.

**Leadership philosophy.** The field of leadership, and the personnel involved, impacts how leadership is described and how leadership practices are applied (Kessler, 2013; Bolman & Deal, 2013). For example, western leader-follower relationships differ from other cultural leader-follower relationships (Hotep, 2010), in philosophy and application. Some Christian organizations enforce a *glass ceiling* for women (Dahlvig & Longman, 2014). These are philosophical differences that exist in certain leadership scenarios.

The data addressed a certain type of philosophy that should accompany the executive leadership of CAHSOs. Each of the categories pointed to a way executive leaders should think, the explanation for why they worked, or the philosophies by which they should manage. Several participants explained that money should not be the primary incentive for working in their organization. A significant amount of the data made reference to the executive leader's state of mind. Research participants' advice implied that an executive leader should understand that some experiences are simply the by-product of the job, organization, and field.

The data painted a picture associated with operational standards or organizational culture. Participants stressed the need to establish culture or model behavioral/professional standards for the organization, such as how team members communicate, deadline or task expectations, and rules for engaging potential partners or clients. According the data, these areas were tied to the philosophy of the organization. Apparently, making sure these areas are intact was the responsibility of the organization's executive leader.

**Seek knowledge.** Effective leaders have abundant knowledge along with many other traits (Omran 2009). Executive leaders must know the state of the industry that they are working within, while managing resources, brand value, and other organizational responsibility (Jurkiewicz & Massey,1998). Similarly, the data placed great value on the knowledge of the leader. Knowing the staff, the state of nonprofit industry, the next wave of social service funding opportunities, and the state of the organization's finances were some of the examples that the data revealed. The data implied that an executive leader's knowledge equips him/her to be successful or avoid certain mistakes while leading.

## Key Findings

The key findings for this study are as follows. CAHSOs are currently classified as nonprofit organizations. The literature suggested that most nonprofit executive leaders leave their field within 5 years (Bell et al., 2006). The researcher was surprised to find that this was only true for one of the executive leaders in this study, who happened to be the second youngest research participant. The other executive leaders had more 15 years of experience at their organization in their position, and a cumulative total of 190+ years amongst them.

According to Kotter (1990) and White (1990), there is a distinction between leadership and management. The participants carried the executive leadership title; however, the bulk of their responsibility was managerial in nature. As mentioned previously, Kotter (1990) described the difference between managers and leaders, as shown in Table 1, generally labeling leaders as visionaries and managers as implementation specialists. Based on this distinction, compared to this research project's data, a more appropriate title for the study participants might have been *executive manager* instead of *executive leader*.

The amount of data that suggested management tasks or gave management advice revealed another key finding. The data did not reveal any thoughts about casting vision; responses only revealed thoughts about bringing the vision to fruition, which is the primary role of the manager (Kotter, 1990). Sometimes the line is blurred between managers and leaders (Lee, 2011). An extensive review of the data revealed that the line might be blurred and combined. This combination, of the leadership responsibility and management tasks, is one that can cause challenges for executive leadership (Stanley, 2006). It is possible that some executive leaders should have management titles. It is also possible that lack of support personnel forced executive leaders to struggle with balancing leadership roles and management tasks. Or, perhaps their management responsibilities prevented the participants from excelling in their leadership role.

Another key finding was the lack of reflection surrounding executive problematics or leadership scandals within CAHSOs. There are several documented scandals or problematics with leaders of faith-based institutions (Tropman & Shaefer, 2004). This is partially due to the loss of charisma or moodiness (Smith & Nelson, 2005). While the data revealed words that imply loss of energy and tiredness, the participants failed to mention integrity or scandal as part of the challenges they face. The absence of data related to executive problematics or leadership scandals suggested a lack of reflection, and seemingly concern, about the leadership problems that exist in faith-based nonprofits, i.e., churches. Either executive problematics don't exist or are irrelevant to executive leaders of HSOs that are affiliated with a church.

## Implications

The lack of specific research related to the experience of executive leaders in CAHSO increases the value of this project's results. A thorough analysis of the results revealed implications that impact various audiences. The results of this study carry implications for the executive leaders of current and future CAHSOs, Pastors of churches that have or are considering initiating a HSO, and thought leaders in the faith-based HSO field.

**Implications for city, state, and federal leadership.** Current literature continues to lack consensus about how to label HSOs that are tied to a religious tradition (Jeavons, 1997, 2002; Sider & Unruh, 2004). However, the research findings highlighted the relentless and often successful work of CAHSOs led by selfless executives. For little pay and insufficient resources, these executive leaders committed to maintaining organizations that meet the needs of struggling communities. Current research shows resistance to CAHSOs as preferred and effective partnership agencies because these organizations have not produced a written account of their results, among other reasons (Ebaugh et al., 2003; Gibelman & Gelman, 2002). The findings of this research project can serve as an incentive to continue encouraging these partnerships while increasing access to federal grants and support resources for these organizations. Encouraging these type of partnerships, while increasing access to more resources, might increase the likelihood that more underserved indigent populations will receive life-sustaining support.

**Implications for executive leaders of current and future CAHSOs.** The significance of the experience of the executive leader in a CAHSO cannot be overstated or overlooked. The results concluded that executive leaders are overworked and underpaid and that human, financial, and real estate capital was inadequate. These findings, combined with decreasing national volunteer statistics ("U.S. Department of Labor, Bureau of Labor Statistics," 2015), painted a grim picture for executive leaders of CAHSOs, casting a dark cloud over sustainability efforts. It is imperative that current and future executive leaders use this foundational research as a standard knowledge base when considering where to serve as an executive leader. Every current and future HSO that affiliates with a church can use this research to make an informed decision about becoming part of or remaining in this field. Ignoring these research results may perpetuate a lack of awareness and possibly lead to unnecessary organizational and leadership struggles.

**Implications for executive leaders of churches without a CAHSO.** Pastors who lead churches without a HSO inevitably face a tough decision. There are many advantages to developing a successful HSO that affiliates with a church. Some of these advantages include improved community relationships, reputation and brand development, non-church communities reached, and new funding relationships established. However, the findings also revealed various difficult byproducts of this decision, such as strained relationships, coordinating separate executive teams, maintaining legal integrity amongst two separate nonprofit entities, and retaining community or people centered identity. The findings can serve as the evidence for churches to make informed decisions before establishing or integrating a human services organization. Pastors and other church executive staff do not have to make uninformed ambiguous decisions and can recognize the challenges of starting a HSO in advance.

**Implications for thought leaders in the faith-based nonprofit field.** As mentioned previously, the experience of executive leaders in CAHSOs is heavily under researched. The results of this study presented a new narrative and new information to the faith-based nonprofit field. This research can be used to further the case and concerns that executive leaders face in faith-based nonprofits. The data in this research can also spark current or future students to further research performed in previous faith-based nonprofit studies.

**Recommendations for Emerging Leaders**

The research results produced recommendations that are rooted in the collective voices of the research participants. These results articulated the importance and seriousness of serving as an executive leader of a CAHSO. Simultaneously, the results of the research have created a series of recommendations that the researcher believes are paramount for emerging leaders of CAHSOs.

These recommendations begin with the reminder that the experiences of executive leaders of CAHSOs are under-researched. There are many lessons that remain undocumented and task of successfully leading these types of organizations is full of ambiguity and mistakes. Therefore, the researcher recommends that emerging leaders commit to actively seeking or building a community of colleagues for the purpose of professional development and personal development. The task of leading people-serving organizations is too important to endure without a supportive empathetic group of peers and organizational partners.

The research recommends that emerging leaders prepare themselves for gradual growth and learning. The lack of research in this field is accompanied by the need to slowly learn the lessons this field and this experience offers. Moving too quickly or striving to grow too fast gives birth to frustration, wasted resources, and short-term leaders. The researcher also recommends that emerging leaders prepare themselves for subtle, and sometimes explicit, conflict with the executive leaders of the church (i.e., pastor, clergy, etc.). Establishing a thriving CAHSO requires implementing systems, developing infrastructure, making hard decisions, remaining mission centered, and learning to co-exist with other leaders or team members. This conflict is the byproduct of growing and a necessary part of organizational clarity.

Finally, emerging leaders face the reality of dwindling or scarce financial resources and are often consumed or overly focused of money itself. Emerging leaders should be careful not to invest too much personal and professional energy into the money. CAHSOs exist to serve people. They exist to make sure that starving families eat, neglected students receive academic support, struggling families receive resources, health deprived communities receive care, and homeless communities receive shelter. Emerging leaders should strategically refocus on serving and loving people. Financial incentives, in most cases, lack longevity and ultimately lack altruistic value. Love for the people who depend on CAHSOs is the key.

**Future Research Opportunities**

Research about the experience of executive leaders of HSOs that affiliate with churches is in its initial stages. Consequently, this research study is far from exhaustive. Many areas still deserve to be discussed. This study focused generally on the experience of the research participants. Although the word *church* serves to unify a variety of Christian congregations, theological frameworks, traditional practices, and the history of leadership in these congregations are relevant. This study summarized the experience of participants across various churches, Christian traditions, and denominations. These factors were not part of the criteria for inclusion and exclusion. It is possible that the participant's experience was influenced by the theology and teaching of the church that their HSO is affiliated. Therefore, a recommendation for future research is a comparative study using similar participants while making the criterion for inclusion specific to a Christian church or denomination like Methodist, Baptist, or non-denominational.

Race and ethnicity are elements of leadership that were mentioned in the literature review (Ayman & Korabik, 2010; Chin, 2010; Hotep, 2010; Singh & Krishnan, 2007;). This study did not use these as part of the criteria for inclusion or exclusion. Participants in this study represented various races, such as Caucasian, Latino, and Black. A phenomenological study of the experience of one race or ethnicity in comparison to another will increase the depth of knowledge in this field of research.

Gender appears prominently as a factor in the broad landscape of leadership research (Dahlvig & Longman, 2014; Northouse, 2012; Singh & Krishnan, 2007). The general conclusion is that women in leadership experience unique challenges and opposition, in contrast to their male counterparts. Although this study did not use data about gender as a key feature, it is possible that the experience of executive leaders in CAHSOs may vary based on the gender of the person involved. A comparative study that examines the same audience while categorizing the data based on gender, might reveal interesting truths about the leadership experience as it relates to larger leadership research narrative.

The tenure of executive leaders of nonprofit organizations is a topic that has been researched (Bell et al., 2006; Johnson, 2009; McAlearney, 2010). Most nonprofit executive leave their job in less than 5 years (Bell et al., 2006). This issue is compounded by the exodus or aging out of executives in for-profit and nonprofit fields (Johnson, 2009). The length of time at an organization affects experience. For Tillotson and Tropman (2014), it increases the likelihood that the executive leader will make a mistake with the board or other executive leaders. This study excluded executive leaders that had less than 3 years in their position at their organization. This study also allowed the ceiling of experience to remain undefined. A comparative or longitudinal study on the experience of executive leaders of CAHSO may uncover a unique picture of the evolution of leaders in this field.

Age is also another aspect of this study that was used as a criterion for inclusion and exclusion. A majority of the participants were 50 years old or older; only two of the research participants were younger than 50. One participant did refer to some challenges related to age and gender; however, it was not a major part of the commentary. A specific phenomenological study, using the same criteria for inclusion, while specifying that participants must be between the ages of 25 and 50, may produce comparative literature for this field.

Issues related to race, gender, and age create a broad blank canvas for a series of uniquely specific research. The study did not inquire about how the demographics (race, gender, and age) of other executive leaders, executive board members, congregation members, or clients impacted the experience of the executive leader in their CAHSO. These factors did not appear explicitly in the data. This research study also did not use these elements as criteria for exclusion or inclusion. Seemingly, tremendous opportunity exists to expand this research considering the nuances that exist when race, culture, gender, and age of other leaders or organizationally associated groups are considered. It is possible that these factors shape the narrative offered by research participants, the challenges experienced, the strategies implemented, and the advice suggested. Other opportunities for further research in these areas are listed subsequently:

- A comparative study tracking the experience of executive leaders of CAHSOs specific to the type of service they offer like affordable housing, social services, education, food service, etc. When CAHSOs offer various services, sometimes each component has separate executive staff.

- A comparative study tracking the experience of executive leaders of CAHSOs with low and high operational budgets. Such a study may seek to answer a question about how budget size affects experience.

The new specificity that this research field presents offers fertile investigative ground to any interested researcher.

**Author's Observations**

Several elements of the data were unexpected. One participant offered a surprising organizational description during the interview. This executive leader explained the organization having headquarters on the site of the church, but that the HSO was not itself affiliated with the church. Such a surprising description offers an opportunity to discuss how HSOs define their relationship with the church when they are housed in the same location. It would be interesting to study other nonprofit organizations in this situation to discover how their executive leaders articulate their relationship with the agency that houses their operation.

Surprisingly, only two participants referenced culture in relation to their leadership experience. One executive leader referred to the black church and the black pastors' tendency prioritize spiritual growth over community involvement or activism. The other executive leader referred to the difficulty surrounding gaining trust within the Latino community and how Latino community members expect CAHSOs to use programming solely to proselytize or as a way to encourage religious conversion. Due to various recent media reports related to race, culture, and diversity, the absence of reflection about these issues among participants (10 Black, 3 Latino, and 1 White) was unexpected. Seemingly, these issues were not as relevant to participant's reflection on leadership.

Several research participants, when introducing themselves or giving advice, mentioned their extensive background in money management or accounting. There seemed to be an obvious link between the ability to manage money competently and the task of being an executive leader in a CAHSO. As stated previously, the data also revealed having or raising money as an indicator of success. This finding implies that competence and comfort with issues surrounding money is an attribute that participants deemed necessary for executive leaders. It also implies that future researchers should investigate the importance of money management or accounting skills and the success of a CAHSO, which might offer great insight to other leaders in the field.

Accompanying their money management background, participants strongly suggested using business practices as the key to success in their organizations. While being labeled a nonprofit executive, according to the data, these leaders employed general business practices related to accounting, reporting procedures, and management tools. Two of the participants said that the nonprofit is a business, just in a different way. Other participants shared the story of leaving their for-profit job to begin working as a nonprofit leader. The key finding was how executive leaders with past corporate leadership or business experience used secular business practices to lead a CAHSO (nonprofit).

Furthermore, the conversation about money and fundraising seemed to overshadow the importance of meeting the needs of the populations being served. Seemingly, every executive leader would have reflected more about the importance of serving communities or touching people. It is possible that the importance of serving people or meeting the needs of suffering populations is implied in the mission of the organization. It is also possible that the responsibility of fundraising caused research participants to reflect less on the vision and mission of providing resources to their community. Regardless, it seemed that the conversation about the experience of executive leaders is an experience of process, business, money, and organizational structure more than a conversation about meeting the needs of people within suffering communities. The data were not people centric; rather, the emerging themes were process centric, resource centric, and organization centric.

Most surprisingly was the lack of data or feedback about God. Research participants articulated a personal relationship with God, yet referenced very little about God in their operation. It is fair to expect more conversation about God when interviewing the executive leadership of the nonprofit that is affiliated with the church. Yet, there was more conversation about the technical and practice realities of being an executive leader of a HSO. Nevertheless, hearing about how a personal relationship with God and religious standards influenced the executive leader's experience or decision-making was a source of motivation and encouragement. While God emerged as a peripheral part of the commentary, the personal theology and religious responsibility of the executive leader of a CAHSO remained an element in the data. More than half of the executive leaders in this study used their Christian responsibility as a foundation for the work they do and the decisions they make. This is a unique part of the research that carries significant implications and creates a foundation for further inquiry in future research study.

**Closing Thoughts**

The results of this research study create a foundation for more investigation. A review of the data points to opportunity for more specific exploration regarding the experience of executive leaders in CAHSOs. This study set out to understand the keys to success within HSO that are affiliated with a church, with the hope of empowering more Christian churches to leverage these opportunities for greater impact. However, it is clear that this research is the inception of a much-needed field of research.

The data revealed information that lines up confirms some of the researcher's previously held assumptions and personal experience. Consequently, bias is likely included as part of the project. The significance of this study was in discovering how similar the participants' stories and feedback were. Participants, regardless of the size of their organization, responses included similar challenges. There seemed to be commonality to organizational struggles despite the expertise of the executive leader. Each participant faced the challenge of fundraising, managing staff, establishing policy, making tough decisions, and managing personal life.

The goal of this study was to make a strong case for church leadership to give birth to or strengthen their HSO. The research also intended to display the greatest aspects of CAHSOs and how they ultimately benefit the work of the Christian church. The data were intended to reveal possibility and opportunity for congregation growth or mission expansion in Christian churches that may be on the verge of extinction or closure.

On a larger level, however, the research project offered a greater level of appreciation for the task of being an executive leader of a CAHSO. If nothing else, the study has revealed an opportunity for camaraderie because executive leaders HSOs share similar experiences. Each executive leader faces the reality that certain populations will suffer more acutely without their help and their work. Each executive leader defines success after completing programs or hearing positive feedback from patrons, clients, staff persons, and community leaders. Each executive leader has identified a problem in his or her sphere of influence and committed to supporting a remedy. This is work that can be celebrated.

If these leaders were invited to socialize or participate in a conference, seemingly, community and support would form almost instantaneously. Executive leaders of CAHSOs, while rarely recognized, emerge as the hidden heroes in suffering communities. Their partnership with the leaders and membership of churches extends the voice and reach of an organization that professes a mission to positively impact the lives of those who seek salvation, safety, and supplement in times of difficulty: the Christian church.

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# APPENDIX A

## Approved Recruitment Script

**Approved Recruitment Script**

**(used as an email, phone call, or voice mail)**

Hello (Mr/Mrs. Research Participant),

My name is Charles Dorsey (and I received your information from “Samuel Johnson” or Mr Goggle.com). I am currently a 32-year-old doctoral candidate in the dissertation process at Pepperdine University. I have two more steps to complete before I can submit my work for approval during the Spring of 2016. I would greatly appreciate your support as I move intentionally toward this end

***Therefore, this email (call) serves as an invitation to participate as 1 of 15 individuals who will share their experience as an Executive Leader of a Church Affiliated Human Service Organization.*** My dissertation focuses on the experiences of Executive Leaders of Church Affiliated Human Service Organizations and has the goal of empowering the creation of more organizations that serve the same purpose. In an attempt to gather information from variety of leaders in this field, it is my hope that you would participate as a research participant. You may not realize that research in this area is limited. Consequently, your participation has the potential to start a conversation that could be ***ground breaking*** for other leaders and workers in this field.

***Please reply to this email (call me back or let me know) if you are interested in participating or if you have further questions.***

APPENDIX B

Informed Consent

**PEPPERDINE UNIVERSITY**

***Graduate School of Education and Psychology***

**INFORMED CONSENT FOR PARTICIPATION IN RESEARCH ACTIVITIES**

PROGRAM, PARTNERSHIP, RESOURCE MANAGEMENT: SUCCESS PRINCIPLES OF CHURCHES THAT HAVE PROGRAMMATICALLY AND FINANCIALLY SUCCESSFUL NONPROFIT ORGANIZATIONS

You are invited to participate in a research study conducted by **Charles Dorsey, M. Div and Farzin Madjidi Ed.D** at Pepperdine University, because **you are 25 years or older, have 3 years of experience or more as an executive leader of a church affiliated human service organization.** Your participation is voluntary. You should read the information below, and ask questions about anything that you do not understand, before deciding whether to participate. Please take as much time as you need to read the consent form. You may also decide to discuss participation with your family or friends. If you decide to participate, you will be asked to sign this form. You will also be given a copy of this form for you records.

**PURPOSE OF THE STUDY**

The purpose of the study is to determine the challenges that executive leaders face in church affiliated Human Service Organizations, the strategies and practices that are used to address these challenges, and how these leaders track the success of the solutions they implement.

**STUDY PROCEDURES**

If you volunteer to participate in this study, you will be asked to give accurate contact information to the researcher or primary investigator to make sure that you can be reached with the least amount of hassle. After giving this information you will receive an email inviting you to participate. You will be asked to respond to this email expressing your desires to participate.

After formally accepting the invitation to participate as a research participant, you will be invited to complete and return a Research Participant Acceptance Letter and Interview Location Preferences document. The purpose of this document is to coordinate the location and time of the interview based on the preferences of the research participant. This step also ensures that your convenience is the priority.

After you return this document, email calendar invitations will be sent to confirm the best place and time.

On the day of you will host the researcher for 90 minutes, 60 of which will be an interview. The first 20 minutes will include setting up, reviewing consent forms, testing equipment, eliminating sound interference, answering any last minute questions, and ensuring your comfort.

The interview will include 3 audio recording devices to capture the interview for transcription and analytical purposes. If this makes you uncomfortable, you may voluntarily withdraw from participating in this research project. All participants must be willing to be recorded on audio devices.

If you are willing to be recorded, using audio devices, you will be invited to answer several interview questions while being recorded by 3 audio recorders. The interview will also include a timer to make sure we honor your time commitment. You are encouraged to speak honestly about your experience as an executive leader in the organization that you currently work within.

After the interview is completed, the researcher will leave and keep you posted, via email, about the progress of the study project, including when the study has been completed.

## POTENTIAL RISKS AND DISCOMFORTS

The potential and foreseeable risks associated with participation in this study include risk of reputation. If the information that is shared impacts the reputation of the person, organization, or industry this is a potential risk or source of discomfort. However minimal, another potential and foreseeable risk includes the possibility of a breach of confidentially. The researcher will keep files in a password secured device (computer and files) and will destroy your audio files after transcription. Each participant will be identified using a number coding system that will be kept confidential as well. However, the risk still exists.

Another potential risk includes the possibility of the feedback causing negative memories and impacting self-esteem. Reflection during interview may minimally impact self-esteem. Another potential risk includes sacrifice of time due to hosting the interview and completing documents.

## POTENTIAL BENEFITS TO PARTICIPANTS AND/OR TO SOCIETY

You have an opportunity to participate in groundbreaking research on behalf of executive leaders in church affiliated human service organizations. This is a field that has not been well researched in the past. Therefore, you will have the opportunity to share an experience that can help other leaders in your field of work. Many people will read about your experience and improve practices, strategies, and procedures. Furthermore, this study will tell the importance of church affiliated human service organizations and their leaders.

## CONFIDENTIALITY

I will keep your records for this study confidential as far as permitted by law. However, if I am required to do so by law, I may be required to disclose information collected about you. Examples of the types of issues that would require me to break confidentiality are if you tell me about instances of child abuse and elder abuse. Pepperdine's University's Human Subjects Protection Program (HSPP) may also access the data collected. The HSPP occasionally reviews and monitors research studies to protect the rights and welfare of research subjects.

However, all other identifiable information will be kept confidential. The data will be stored on a password-protected computer in the principal investigators place of place of residence. The data will be stored for a minimum of three years. The data collected will be coded, de-identified, transcribed, and analyzed.

The audio recording will be transcribed by a professional transcription service and returned to the principle investigator. This process will include removing the audio file from the recording devices and sending it to the electronic sources as directed by the transcription organization. The transcribed information will be sent back to the principle investigators password protected email address for storage and analysis.

After the transcription has been completed, the principle investigator will create number coded identifiers, while simultaneously removing names and another other identifiable information, to maintain your confidentiality. Audio files will be destroyed and the principle investigator will keep the master list of coded numbers for research reference purposes only. This information will be kept in a password-protected email on a password-protected document for three years.

## PARTICIPATION AND WITHDRAWAL

Your participation is voluntary. Your refusal to participate will involve no penalty or loss of benefits to which you are otherwise entitled. You may withdraw your consent at any time and discontinue participation without penalty. You are not waiving any legal claims, rights or remedies because of your participation in this research study.

**ALTERNATIVES TO FULL PARTICIPATION**

The alternative to participation in the study is not participating or completing only the items which you feel comfortable.

**EMERGENCY CARE AND COMPENSATION FOR INJURY**

If you are injured as a direct result of research procedures you will receive medical treatment; however, you or your insurance will be responsible for the cost. Pepperdine University does not provide any monetary compensation for injury

**INVESTIGATOR'S CONTACT INFORMATION**

I understand that the investigator is willing to answer any inquiries I may have concerning the research herein described. I understand that I may contact Charles Dorsey at [redacted] or [redacted] Farzin Madjidi at Farzin.Madjidi@pepperdine.edu or (310) 568-5600 if I have any other questions or concerns about this research.

**RIGHTS OF RESEARCH PARTICIPANT – IRB CONTACT INFORMATION**

If you have questions, concerns or complaints about your rights as a research participant or research in general please contact Dr. Judy Ho, Chairperson of the Graduate & Professional Schools Institutional Review Board at Pepperdine University 6100 Center Drive Suite 500 Los Angeles, CA 90045, 310-568-5753 or gpsirb@pepperdine.edu.

# APPENDIX C

## Research Participant Acceptance Letter and Interview Location Preferences Form

**Research Participant Acceptance Letter and Interview Location Preferences**

**(used as an email, phone call, or voice mail)**

Hello (Mr/Mrs. Research Participant),

My name is Charles Dorsey, the 32-year-old doctoral candidate from Pepperdine Univerity, and I wanted to thank you for accepting the invitation to participate in my dissertation process. I am humbled by your support and willingness to sacrifice time and expertise toward my academic goals.

**The next most important step is scheduling a place and time for your participation.** To create the greatest level of convenience, please provide the following information:

***(READ CAREFULLY BEFORE COMPLETING THE NEXT SECTION)***

Location: When choosing a location please keep in mind that the interview will be recording for research purposes. Noisy or windy locations are not advised.

Preferred Location and Address:

________________________________________________

Availability for 90 minutes (check boxes that apply)
Note: I have only included Tuesday and Thursdays and times when I am available

| Dissertation Interview Schedule<br>February 2016<br>(Availability for Tuesdays and Thursday) | | | | |
|---|---|---|---|---|
| | Morning (9:00pm-12:00n) | Afternoon (1:00pm-4:00pm) | Evening (5:00pm-8:00pm) | Other Day/Time |
| 2/2 (Tuesday) | | | | |
| 2/4 (Thursday) | | | | |
| 2/9 (Tuesday) | | | | |
| 2/11 (Thursday) | | | | |
| 2/16 (Tuesday) | | | | |
| 2/18 (Thursday) | | | | |

**Please complete and return with 7 days**

(If I have not heard from you, you will receive a follow up phone call)

# APPENDIX D

## Peer Feedback Cover Sheet and Packet

Dear Peer Review Team,

Thank you for participating in this part of my dissertation. In the packet you have received:

- **Summary Statement (explains the purpose of the research)**
- **Research questions**
- **Corresponding interview questions**
- **Instructions for completing the packet and returning it to researcher.**

Note: If you do not have these elements, please contact the researcher immediately.

Please ***read*** and ***follow*** the steps listed below in the order they are listed:

1. **Read and Understand** summary statement
2. **Review** the research questions (found in the table below).
3. **Carefully read** each corresponding interview question.
4. **Provide Feedback by checking the designated boxes**
    a. **Keep** – which means the question is directly relevant to research question
    b. **Do not Keep** - which means the question is irrelevant to the research question
    c. **Modify** – which means the interview question must be modified for clarity or improvement purposes

***Note: I have also left a space for you to provide additional feedback like other research questions or suggestions.***

**Summary Statement**

There is a lack of research related to the experiences, strategies, and best practices of executive leaders in **c**hurch affiliated human service organizations. Currently, it is eclipsed under the banner of executive leaders of faith-based nonprofit organizations. However, what church affiliated HSO's contribute to the community and the congregations that they are mutually connected to deserves its own platform. Furthermore, the social, economic, or community impact of church affiliated human service organizations cannot be attributed exclusively to its name, its reputation, or mission. It must attributed to the decisions, skills, legacy, and management style of executive leadership.

Accordingly, the purpose of this study is to determine the challenges that executive leaders face in church affiliated human service organizations, the strategies and practices that are used to address these challenges, and how these leaders track the success of the solutions they implement. This study will also determine what advice executive leaders give to emerging leaders who work for church affiliated human services organizations.

We plan to gather this information through the attached questions that have been validated using feedback from strategically chosen peers and qualified expert review personnel.

**Thank you for diligence and attention to detail during this process.**

**Research and Interview Question Feedback Form**

| **Research Questions # 1** | **Corresponding Interview Questions** | **Keep** | **Do not Keep** | **Modify** | **Suggestions** |
|---|---|---|---|---|---|
| *What challenges do executive leaders in church affiliated HSOs face?* | What challenges do you face in leading your Church Affiliated Human Service Organization? | | | | |
| | Follow up questions | | | | |
| | Describe your responsibility in this corporation. | | | | |
| | Which of these challenges give you the highest level of stress? | | | | |
| **Research Questions # 2** | **Corresponding Interview Questions** | **Keep** | **Do not Keep** | **Modify** | **Suggestions** |
| *What strategies have executive leaders in church affiliated HSOs devised to overcome these challenges?* | What strategies have you implemented to address the challenges within your organization? | | | | |
| | **Follow up questions** | | | | |
| | What strategies have been most effective during your tenure as an executive leader? | | | | |
| | What is your normal response to challenges in your organization? | | | | |
| **Research Questions # 3** | **Corresponding Interview Questions** | **Keep** | **Do not Keep** | **Modify** | **Suggestions** |
| *How do executive leaders in church affiliated HSOs know if their strategies and practices are effective?* | What is your definition of success for your HSO? | | | | |
| | **Follow up questions** | | | | |
| | How do you know if your executive leadership strategies worked? | | | | |
| | How to you track your improvements or adjustments as an executive leader? | | | | |
| | Who is responsible for assessing the effectiveness of strategies and practices in your human service organization? | | | | |
| **Research Questions # 4** | **Corresponding Interview Questions** | **Keep** | **Do not Keep** | **Modify** | **Suggestions** |
| *What recommendations would church affiliated HSO executive leaders make to professionals in the field?* | Share some of the main lessons you have learned as an executive leader in a HSO. | | | | |
| | **Follow up questions** | | | | |
| | What recommendations would you make to other leaders in your field? | | | | |

# APPENDIX E

## Final Interview Protocol

| | |
|---|---|
| Introduction | ☐ |
| Research project Explanation | ☐ |
| Consent Review | ☐ |
| Consent Signed | ☐ |
| Water Issued/Offered | ☐ |
| Recording devices operational | ☐ |

**Interview Protocol Project: Pepperdine University EDOL Program**

**Project: Executive Leaders in church affiliated Human Service Organizations**

| | | |
|---|---|---|
| Date:<br><br>Interview:<br>Charles Dorsey | Time of Interview:<br><br>Interviewee: | Location:<br><br>Length of Interview: |

**Prior to Interview Check List:**
Introductory statement:
Thank you for your participation. I am humbled that you would take the opportunity to support this field and my research. Your input will enhance this field and supports our effort to add value to the research community and those that desire to excel in their leadership craft. Please know that your identity will be kept confidential as part of our academic and research integrity.

Research Project Purpose: the purpose of this study is to determine the challenges that executive leaders face in church affiliated Human Service Organizations, the strategies and practices that are used to address these challenges, and how these leaders track the success of the solutions they implement.

Icebreaker

**Question 1: What challenges do you face in leading your Church Affiliated Human Service Organization?**

**Question 2: What strategies have you implemented to address the challenges within your organization?**

**Question 3: What is your definition of success for your HSO?**

**Question 4: Share some of the main lessons you have learned as an excutive leader in a HSO**

# APPENDIX F

## IRB Approval Notice

**Pepperdine University**
**24255 Pacific Coast Highway**
**Malibu, CA 90263**
**TEL: 310-506-4000**

### NOTICE OF APPROVAL FOR HUMAN RESEARCH

Date: February 12, 2016

Protocol Investigator Name: Charles Dorsey

Protocol #: 15-12-153

Project Title: Program, Partnership, Resource Management: Success Principles of churches that have programmatically and financially sucessful monprofit organizations

School: Graduate School of Education and Psychology

Dear Charles Dorsey:

Thank you for submitting your application for exempt review to Pepperdine University's Institutional Review Board (IRB). We appreciate the work you have done on your proposal. The IRB has reviewed your submitted IRB application and all ancillary materials. Upon review, the IRB has determined that the above entitled project meets the requirements for exemption under the federal regulations 45 CFR 46.101 that govern the protections of human subjects.

Your research must be conducted according to the proposal that was submitted to the IRB. If changes to the approved protocol occur, a revised protocol must be reviewed and approved by the IRB before implementation. For any proposed changes in your research protocol, please submit an amendment to the IRB. Since your study falls under exemption, there is no requirement for continuing IRB review of your project. Please be aware that changes to your protocol may prevent the research from qualifying for exemption from 45 CFR 46.101 and require submission of a new IRB application or other materials to the IRB.

A goal of the IRB is to prevent negative occurrences during any research study. However, despite the best intent, unforeseen circumstances or events may arise during the research. If an unexpected situation or adverse event happens during your investigation, please notify the IRB as soon as possible. We will ask for a complete written explanation of the event and your written response. Other actions also may be required depending on the nature of the event. Details regarding the timeframe in which adverse events must be reported to the IRB and documenting the adverse event can be found in the *Pepperdine University Protection of Human Participants in Research: Policies and Procedures Manual* at community.pepperdine.edu/irb.

Please refer to the protocol number denoted above in all communication or correspondence related to your application and this approval. Should you have additional questions or require clarification of the contents of this letter, please contact the IRB Office. On behalf of the IRB, I wish you success in this scholarly pursuit.

Sincerely,

Judy Ho, Ph.D., IRB Chairperson

cc: Dr. Lee Kats, Vice Provost for Research and Strategic Initiatives