

EXPLORING SUCCESSION PLANNING FOR EXECUTIVE LEADERSHIP POSITIONS
WITHIN OHIO'S FAITH-BASED ORGANIZATIONS: A MULTIPLE-CASE STUDY

by

Gilda L. Drammeh

Dissertation

Submitted in Partial Fulfillment
of the Requirements for the Degree of
Doctor of Business Administration

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Abstract

The predicted shortage in the number of qualified professionals available to fill vacant executive leadership positions is a significant concern for the non-profit sector. This qualitative multiple-case study explored the general problem of the potential lack of succession planning, resulting in the inability to identify future leaders within Ohio's faith-based organizations. Specifically, this study concentrated on the selection process of candidates for executive leadership positions, and the succession planning process that contributed to a successful or failure to implement. In a purposeful sample, eighteen (18) senior leaders located in the eastern and western regions of Ohio, were selected for this study. As part of the conceptual framework, Hershey and Blanchard's (1993) situational leadership theory were used to understand the group facilitator's leadership style during succession planning activities. Data was collected and analyzed from semi-structured interviews, documents, and archival records. Findings are discussed from the perspective of senior leaders, which included current and former volunteers, and employees that previously participated in succession planning activities to appoint a new leader at Ohio's faith-based organizations. Five themes emerged from the study and highlighted the strategies chosen by senior leaders as they prepared for succession planning activities. Furthermore, the results of this study and the future recommendations provided, contributed to the body of knowledge, and expanded the topic of succession planning for executive leadership positions in the non-profit sector.

Keywords: executive leadership, succession planning, selection, faith-based organization

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Approvals

Gilda L. Drammeh, Doctoral Candidate

Date

Jimmy Duncan, Ph.D, Dissertation Chair

Date

Deborah A. Johnson-Blake, Ph.D, Committee Member

Date

Edward M. Moore Ph.D, Director of Doctoral Programs

Date

Dedication

I would like to dedicate this dissertation study to my parents, Keith Jackson, Sr., and the late Kathie Howard-Johnson. My mother encouraged me to study the field of business and pursue my dreams and aspirations of becoming a first-generation doctor. My father taught me the importance of hard work, persistence, and determination, and is my biggest supporter of academic success. As a child, he always knew that I loved school and reminded me that I could accomplish anything that I set my mind to.

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Section 1: Foundation of the Study

The increase in the number of executive leaders eligible for retirement in the United States introduced new challenges for the non-profit sector, especially when there was not an ample supply of qualified professionals to fill these vacancies (Hunter & Decker-Pierce, 2021; Stewart et al., 2020). Instead of promoting employees from within the corporation, non-profit organizations hired third-party executive search firms to reach qualified candidates (McKee & Froelich, 2016; Nelson, 2020; Shera & Bejan, 2017; Vito, 2018). The qualitative multiple-case study presented by the researcher focused on the general problem of the potential lack of succession planning, resulting in the inability to identify future leaders within non-profit organizations. Specifically, this qualitative multiple-case study concentrated on the selection process of candidates for executive leadership positions and succession planning for executive leadership positions within Ohio's faith-based organizations.

In a purposeful sample, eighteen (18) senior leaders within Ohio's faith-based organizations were interviewed for this study. Each participant consisted of former or current volunteers, and employees of an Ohio faith-based organization that previously participated on a committee to appoint a new leader. The participants' perspective of the processes used for executive leadership selection and succession planning revealed five themes that contributed to the successful or failure to implement succession planning efforts. Moreover, this study found that some of the common issues and challenges identified in the academic literature on succession planning efforts within the non-profit sector were discovered. The results of the study may provide a foundation and guide for non-profit organizations interested in conducting succession planning activities for executive leadership positions or those seeking to expand its leadership development pool.

Background of the Problem

The selection of executive leaders in the non-profit sector was a significant concern for faith-based organizations (Barton, 2019). Over the past decade, the number of chief executive officers (CEOs) in the non-profit sector eligible for retirement increased, while there was no ample supply of qualified professionals to fill these vacancies (Hunter & Decker-Pierce, 2021; Stewart et al., 2020). The non-profit sector has reported shortfalls in identifying internal candidates eligible for executive leadership positions (Nelson, 2020). To reach qualified candidates, non-profit organizations hired third-party executive search firms instead of promoting from within the corporation (McKee & Froelich, 2016; Nelson, 2020; Shera & Bejan, 2017; Vito, 2018).

While a third-party recruiter helped filled vacant executive leadership positions in the non-profit sector, it was imperative to consider the succession planning process to find future leaders internally. Non-profit boards reported that hiring a new chief executive was time-consuming and human resource-intensive (Stewart, 2016). Choosing the wrong candidates for executive leadership positions caused organizations to restart the selection process, thus bringing uncertainty and disruption in the office (Stewart et al., 2020). Stewart et al. (2020) revealed that non-profit organizations replaced their successor as early as four months because they resigned unexpectedly. Additionally, Stewart (2016) revealed that 62% of non-profit organizations had a decrease in staff due to executive leadership transitions. Without succession planning, non-profit organizations were unable to capture and provide insight into the skillsets needed to attract the right talent for career seekers of executive leadership positions (Heneman et al., 2019).

The career path of former non-profit chief executives has been examined, but less was known about the process used to select candidates for future executive leadership positions

(Nelson, 2020; Norris-Tirrell et al., 2018; Santora et al., 2019). The research conducted may help leaders better understand the process used to select candidates for executive leadership positions. This study contributed to the body of knowledge by exploring the predicted shortage of non-profit chief executives and the need for succession planning (McKee & Froelich, 2016). Moreover, this study explored whether a decision maker's effort during the succession planning process lead to the potential success or failure to implement succession planning in faith-based organizations (Hersey & Blanchard, 1993). Additionally, this study contributed to the body of knowledge by exploring the shortcomings of opportunities for growth and promotions in faith-based organizations that lead to executive leadership positions (Norris-Tirrell et al., 2018).

Problem Statement

The general problem addressed was the potential lack of succession planning at non-profit organizations, resulting in the inability to identify future executive leaders. McKee and Froelich (2016) stated that several non-profit organizations knew their chief executive officer was planning to retire within the next four years, but refrained from hiring an internal candidate qualified for the position. Ballaro and Polk (2017) noted that organizations could not identify employees ready for promotions because there was no plan to assess the competencies required for leadership positions. Stewart et al. (2020) found that 59% of non-profit organizations were left several months without an executive leader as they failed to appoint an interim. The specific problem addressed was the potential lack of succession planning at faith-based organizations within the state of Ohio, resulting in the inability to identify future executive leaders.

Purpose Statement

The purpose of this flexible design multiple-case study was to explore the reasons behind the potential lack of succession planning, resulting in the inability to identify future leaders in the

non-profit sector. The researcher sought to understand the factors by which faith-based organizations selected executive leaders. Additionally, this study explored the factors that contributed to the potential success or failure to implement succession planning. The larger problem of the potential lack of succession planning was explored through an in-depth study of the inability to identify future leaders in faith-based organizations in Ohio.

Research Questions

The research questions helped to explore the selection process for the executive leadership position and the usage of succession planning. This study utilized a qualitative approach to explore faith-based organizations in the state of Ohio, their experiences with selecting executive leaders, and the implementation of succession planning practices. Case study research questions focused on understanding an event that occurred to a group or individual within a specific point of time (Yin, 2018). Specifically, a case study design was the appropriate research method for this study because it explored the process of selecting executive leaders within faith-based organizations (Kramer & Nayak, 2013). Additionally, this study explored a decision maker's effort to implement succession planning for executive leadership positions and how their strategy lead to a particular outcome (Hersey & Blanchard, 1993; Word & Sowa, 2017).

The central research questions were:

- RQ1. What are the factors used by faith-based organizations to select executive leaders?
- RQ2. What factors contribute to the successful implementation of succession planning efforts for executive leadership positions at faith-based organizations?
- RQ3. What factors contribute to the failure of succession planning efforts for executive leadership positions at faith-based organizations?

The first research question helped to better understand the candidate selection process for executive leadership positions at faith-based organizations. Exploring the compatibility issues between the individual and the organization was essential for determining if they worked together effectively (Stewart, 2016). The second research question explored the actions taken by faith-based organizations that potentially lead to the successful implementation of succession planning efforts for executive leadership positions. Outside influences controlled the decision-making process for groups of individuals participating in certain activities (Cahill, 2016). The third research question attempted to address the actions taken by faith-based organizations that potentially lead to the unsuccessful implementation of succession planning for executive leadership positions. Identifying the criteria used by the organization and their decision to participate in succession planning for executive leadership positions gave insight into the candidate selection process (Stewart & Twumasi, 2020). Overall, the three research questions helped structure the literature review and laid the foundation of the study.

Nature of the Study

This qualitative multiple-case study aimed to understand the factors by which faith-based organizations selected executive leaders and the potential success or failure in implementing succession planning. This research was based on a multiple-case study method, which allowed the researcher to explore and identify the common themes to understand the complexity of succession planning for executive leadership positions. Therefore, a qualitative research method was appropriate for this study and was an effective tool for answering the research questions (Creswell & Poth, 2018). The instruments utilized to obtain information for this qualitative multiple-case study consisted of semi-structured interviews, documents, and archival records (Yin, 2018). The semi-structured interviews comprised of open-ended conversations with senior

leaders within Ohio's faith-based organizations, which allowed the researcher to explore the reasons for executive leadership selection and succession planning efforts (Yin, 2018).

Additionally, archival records retrieved from the organization's dedicated website provided the researcher with information that was related to candidate selection or succession planning for executive leadership positions (Yin, 2018). Further, document collected from the dedicated websites of Ohio's faith-based organizations enabled the researcher to obtain information that helped determine the patterns or trends associated with candidate selection or succession planning for executive leadership positions (Yin, 2018).

Discussion of Research Paradigms

Positivism. Positivism is a research paradigm based on the belief that society should be studied empirically and scientifically (Creswell & Poth, 2018). Positivism relied on the idea that research should be objective, observable, and quantifiable, with the researcher removed from the study (Creswell & Poth, 2018). Using the scientific method, positivists learn by using theories, making hypotheses, and testing the hypothesis by rejecting or accepting the theories used in the research study (Mukherji & Albon, 2014). A positivist approach for this study would administer a questionnaire or survey to collect quantitative data on succession planning for executive leadership positions (Creswell & Poth, 2018). For data analysis, a researcher would measure the differences in perception of responses over time (Simon & Goes, 2016).

Post-Positivism. Post-positivism holds a scientific approach to research that is objective; however, it differs from positivism by recognizing that cause and effect may or may not occur (Wildemuth, 1993). Post-positivists gained knowledge by using scientific methods through logical steps, including using multiple participants, and employing a rigorous qualitative data collection for analysis and interpretation (Creswell & Poth, 2018). Additionally, post-positivists

believe that theory is correct, but it may be incorrect when new research is conducted (Robson & McCartan, 2016). A post-positivist approach for this study would use mixed-methods research to answer the research questions (Robson & McCartan, 2016).

Pragmatism. Pragmatics believe the world is not viewed as a single entity and research usually happens within social, historical, and political contexts (Creswell & Poth, 2018).

Pragmatics are not committed to one system of reality and believes researchers should have the freedom to choose methods, techniques, and procedures that best suit their needs (Creswell & Poth, 2018). Further, pragmatists view theories instrumentally and consider them accurate to a certain extent (Robson & McCartan, 2016). A pragmatic approach to this study would consider examining the non-profit organization's journey when setting up succession plans and changes when managing without executive leaders (Robson & McCartan, 2016).

Constructivism. The constructivism philosophical assumption uses an interpretive approach and allowed researchers to interact with participants experiencing the same phenomenon through interviews and observations (Lincoln & Guba, 2013). Researchers would take a subjective and non-judgmental approach to learn about the phenomenon from political, social, and cultural aspects (Lincoln & Guba, 2013). Constructivists are very open, and their approach to research does not proscribe or prescribe a specific way of doing things (Robson & McCartan, 2016). Moreover, researchers should be flexible to adjust the research as necessary (Robson & McCartan, 2016).

Researcher's Paradigm. The researcher's paradigm for this study was constructivist. For this study, the researcher needed to interact with participants to better understand the succession planning process for executive leadership positions and their experience of the candidate selection process (Maxwell, 2005). Lincoln and Guba (2013) implied that the meaning and

experience are better understood when the researcher and participants discuss the research context. Therefore, the phenomenon could only be understood by the researcher within the context being studied (Patton, 2002). One of the goals of this research was to share the lessons learned from the participants' experiences with selecting executive leaders and the implementation of succession planning. Taking a constructivist approach allowed the researcher to hear the participants' voices based on their experiences with the phenomenon (Creswell & Poth, 2018).

Discussion of Design

Fixed designs are usually concerned with group aggregates, and the results are reported in group averages rather than what individuals have done (Robson & McCartan, 2016). Moreover, fixed designs are quantitative and contained independent and dependent variables (Robson & McCartan, 2016). The results from quantitative studies are tested using a hypothesis and theory (Robson & McCartan, 2016). Unlike flexible designs, quantitative researchers do not interact with participants and collect numerical data (Robson & McCartan, 2016). Experimental, quasi-type experimental, and non-experimental are three classifications used for quantitative studies and are appropriate for specific research projects (Robson & McCartan, 2016).

Experimental designs took a scientific approach to research where one or more independent variables were manipulated and applied to one or more dependent variables to measure cause and effect (Martella et al., 2013). Experimental designs involved collecting, gathering, and analyzing quantitative data to perform statistical analysis (Moeyaert et al., 2014). The setting for experimental research is conducted in the laboratory, where control can be exerted on the extraneous variables or by eliminating them (Moeyaert et al., 2014). In an experimental design study, the participants are observed repeatedly during baselines, treatments,

phases, and outcomes (Moeyaert et al., 2014). Disadvantages of experimental research included being expensive, having potential ethical complications, and being difficult to measure when finite conclusions cannot be ascertained (Moeyaert et al., 2014).

Quasi-type experimental designs are partial, half, or pseudo (Leavy, 2017). Quasi-type experimental designs are conducted with experimental control groups or experimental groups in their natural settings where the participants are not randomly assigned (Siedlecki, 2020). Quasi-type experimental designs used an independent variable, a dependent variable, and hypotheses (Siedlecki, 2020). There are advantages and disadvantages of using quasi-experimental designs when compared to experimental designs. As an advantage, quasi-experimental designs were less expensive and require fewer resources (Siedlecki, 2020). As a disadvantage, quasi-experimental designs tended to overestimate effect sizes due to the non-random assignment of subjects to groups; therefore, causality should be interpreted cautiously (Siedlecki, 2020).

In non-experimental designs, the analysis occurred ex-post factor, or after the fact, to examine concluded activities (Thompson & Panacek, 2007). Given that non-experimental designs are purely observational and descriptive, researchers were often interested in the overall characteristics of the population being studied (Thompson & Panacek, 2007). In contrast to experimental designs, non-experimental designs lacked control over the study's setting and are susceptible to bias or unreliable results (Thompson & Panacek, 2007).

Discussion of Flexible Designs. This section outlines flexible designs and the appropriateness for the research study. Narrative, phenomenology, grounded theory, ethnography, and case study are flexible research designs used for qualitative studies (Creswell & Poth, 2018). Leavy (2018) indicated that flexible designs differ from fixed designs. For instance, flexible designs began with a single concept and allowed researchers to understand the

phenomenon from the participant's perspective (Leavy, 2018). In contrast, fixed designs began with a researcher seeking to find a causal relationship of variables or a comparison of groups (Leavy, 2018).

Narrative designs are best suited for capturing the stories of individuals or small groups of people who have life experiences to share (Clandinin, 2019). Therefore, researchers spent a considerable time gathering information from multiple sources (Clandinin, 2019). In evaluating how data collection took shape, a researcher considered the cultural and historical perspectives embedded in the participant's stories (Clandinin, 2019). Further, a narrative research design could refer to an entire life story or an extensive account of something that happened in an individual's life (Robson & McCartan, 2016).

Phenomenological research designs allow researchers to obtain an in-depth understanding of the lived experiences of an individual or group of people who have experienced the same phenomenon (Moustakas, 1994). Moreover, phenomenology focused on understanding how people viewed themselves and the world around them (Robson & McCartan, 2016). Researchers used bracketing, generated themes from the data collected, and used horizontalization to eliminate bias (Moustakas, 1994). In developing textual and structural descriptions, a researcher considered the themes and reported the essence by arranging the description around a shared experience (Moustakas, 1994).

The grounded theory generated new theory relating to a particular situation forming the study (Robson & McCartan, 2016). Moreover, grounded theory research designs collected and analyzed data, developed new insights, and utilized those insights as to the basis for subsequent analysis and collection of data used for future studies (Corbin & Strauss, 2008). The researcher used memoing and recordings to assess hypothesis development; however, interviewing was the

most common method to collect qualitative data (Corbin & Strauss, 2008). Grounded theory is defined by movement, action, steps, or phases that occurred over time to explain how something worked (Corbin & Strauss, 2008).

Ethnography research designs analyzed a culture-sharing group's shared and learned patterns of values, behaviors, beliefs, and language (Van Maanen, 2010). First, ethnographers employed theory to explain what a researcher hoped to learn from the study (Van Maanen, 2010). Then, using the participant's views, verbatim reports, and quotes that revealed cultural meaning or interpretation, a researcher looked for patterns in the behaviors the group identified as cultural norms (Van Maanen, 2010). Further, a researcher conducting ethnographic research spent an extended time immersed in the culture being studied (Robson & McCartan, 2016).

Case study research is used to explore a case in-depth that involved a person or groups of individuals experiencing an event (Yin, 2018). Often the case is bounded within in a specific period and conducted in the participants natural setting (Yin, 2018). Case studies required the researcher to collect multiple forms of data through interviews, observations, and documents, which were used to analyze, compare, and develop themes associated with the research (Yin, 2018). There are two types of case study approaches, single-case, and multiple-case (Stake, 2010). A difference between the two is studying one case is called a single-case study, whereas studying more than one case concurrently is a multiple-case study (Yin, 2018). According to Yin (2018), multiple-case studies were replications of a single-case study design; nevertheless, a researcher should not conduct more than four or five cases simultaneously when conducting a multiple-case study. Moreover, applying a theoretical framework to a single-case study would help a researcher better understand the phenomenon within the case (Yin, 2018).

Discussion of Mixed-Methods Research Designs. The three types of mixed-methods designs are convergent parallel, explanatory sequential, and exploratory sequential transformative (Creswell & Plano Clark, 2018). Unlike flexible or fixed designs, mixed-methods research combined and integrated quantitative and qualitative methods in the same study (Creswell & Plano Clark, 2018). A convergent parallel approach collects quantitative and qualitative data simultaneously and combines two data sets (Creswell & Plano Clark, 2018). An explanatory sequential approach uses a quantitative method to explain qualitative results (Creswell & Plano Clark, 2018). Further, an exploratory sequential approach builds the data by exploring a topic using a qualitative method and then implementing a quantitative instrument based on the findings (Creswell & Plano Clark, 2018).

This study was conducted with a flexible design using a qualitative method; specifically, a multiple-case study approach was used. A qualitative research method was appropriate for this study and was an effective tool in obtaining answers to the research questions (Creswell & Poth, 2018). Case study research explores a phenomenon or case about real-life and reflects the experiences of an individual or a group (Creswell & Poth, 2018). Moreover, this study identified five common themes to better understand the potential successes and failures of succession planning for executive leadership positions. Additional information about the themes discovered from this study is located in Section 3.

The narrative, phenomenology, grounded theory, and ethnography research designs were inappropriate research methods for this study (Clandinin, 2019; Corbin & Strauss, 2003; Moustakas, 1994; Van Maanen, 2010). A narrative research approach was inappropriate for this study because it did not focus on telling the stories of individual experiences (Clandinin, 2019). This study explored two processes (a) executive leadership selection, and (b) succession

planning efforts for executive leadership positions. To adequately explore the problem addressed, it was appropriate for the researcher to include eighteen (18) senior leaders who had experience with succession planning activities within Ohio's faith-based organizations. Moreover, a phenomenological design could potentially fit this study because it focused on a particular event that occurred (Moustakas, 1994). However, a case study research design was more appropriate for this study since it focused on a specific time and activity instead of a participants' lived experiences (Yin, 2018). For this study, the researcher explored the timeframe of departure of the outgoing executive leader to the arrival of the incoming successor (Stewart et al., 2020).

Subsequently, the grounded theory design was inappropriate for this study because it did not focus on the participants' viewpoint to develop a theory (Corbin & Strauss, 2008). Additionally, ethnography was inappropriate for this study because the researcher did not describe and interpret shared patterns of a culture or a group for an extended time in the field (Van Maanen, 2010). Further, experimental designs, quasi-experimental, and non-experimental designs were inappropriate for this study because they were quantitative, and the objective of this study was not to find the cause and effect (Martella et al., 2013). Nevertheless, convergent parallel, explanatory sequential, and exploratory sequential transformative were inappropriate research methods for this study because the research questions did not collect quantitative and qualitative information within the same study (Creswell & Plano Clark, 2018).

Discussion of Method

Quantitative research methods aimed to proving, disproving, or enhancing an existing theory (Robson & McCartan, 2016). In a quantitative study, a researcher measured the variables and tested the relationship between variables to find patterns, correlations, or causal relationships

(Martella et al., 2013). Additionally, a researcher could utilize linear methods to collect and analyze data from a large sample size to generate statistical information (Martella et al., 2013). Quantitative research methods are intended to be neutral, objective, and have a broad scope of knowledge acquisition (Robson & McCartan, 2016).

The purpose of qualitative research methods in social and behavioral science was to provide experience, meaning, and perspective from the participant's viewpoint (Creswell & Poth, 2018). Through this approach, researchers explored, investigated, and discovered meanings that individuals attributed to activities, situations, and events to better understand a social phenomenon (Creswell & Poth, 2018). Moreover, qualitative research helped capture the participants' experiences through words rather than numbers (Maxwell, 2005). Qualitative research is flexible and allowed researchers to have the flexibility to modify their designs when there was a need to make new discoveries or relationships as part of the research study (Maxwell, 2005).

A mixed-method research design is similar to qualitative and quantitative designs, except researchers collected and integrated quantitative and qualitative data in the same study (Robson & McCartan, 2016). Mixed-methods research studies are split into phases that influenced each other, where qualitative and quantitative phases are ranked in order of importance (Robson & McCartan, 2016). The integration of quantitative and qualitative data in mixed-methods research investigated the validity of the results (Creswell & Plano Clark, 2018). Moreover, mixed methods studies combined deductive and inductive designs to generate qualitative and quantitative data (Leavy, 2018). This approach is appropriate when a researcher's purpose was to describe, explain, or evaluate complex problems and issues (Leavy, 2018).

A qualitative research method was chosen for this study because it sought to understand the participant's experiences, rather than applying quantitative research methods or measuring cause and effect relationships (Creswell & Plano Clark, 2018). In qualitative research, an individual's subjective experiences and meaning-making processes are valued, and a small sample size of participants was used to gain a holistic understanding (Stake, 2010). This study targeted Ohio's faith-based organizations to better understand the succession planning process for executive leadership positions. Moreover, the researcher used instruments that included interviews, documents, and archival records to present the findings in themes while asking questions, listening, and observing without bias. Additional information about the themes and instruments used for the study is located in Section 3.

As Creswell and Poth (2018) explained, interviews provided an important insight into the affairs and actions of the participants' experiences. Interviews for this study consisted of eleven (11) open-ended questions relevant to succession planning for executive leadership positions at faith-based non-profit organizations. Yin (2018) stated that lengthy interviews consisted of two or more hours per setting. Alternatively, shorter case interviews consisted of an hour and were conducted over multiple settings (Yin, 2018). For this study, the researcher conducted meetings with individuals at faith-based organizations using Microsoft Teams, a web-conferencing portal and the interviews ranged between 15 to 25 minutes in length. Subsequently, to obtain access to Ohio's faith-based organization's files that were not available to the public, the researcher received permission from the person in authority before collecting documents (Yin, 2018). For files that were available to the public, the researcher used the internet to search for documents relevant to succession planning and non-profit organizations (Yin, 2018).

Fixed and mixed methods research designs were deemed inappropriate for this study based on several reasons. First, fixed designs would require the researcher to remain distant from the participants (Creswell & Poth, 2018). Second, mixed-methods research design would require the researcher to both use qualitative and quantitative methods to gain insight into the findings (Creswell & Plano Clark, 2018). For this study, the researcher needed to interact with senior leaders to better understand their perspective of the executive leadership selection and succession planning processes. However, applying a quantitative approach would distance the researcher from interacting with the study participants. Therefore, only a qualitative approach was deemed necessary for this study.

Discussion of Triangulation

This study focused on extending the knowledge of succession planning for executive leadership positions in faith-based non-profit organizations. In qualitative studies, researchers used non-numerical methods of measurement to define and interpret their data (Fusch et al., 2018). The process of triangulating data in a study involved using multiple sources, methods, and theoretical schemes to enhance its reliability (Creswell & Poth, 2018). Triangulation provided a comprehensive picture of a research problem and explored different approaches for presentation (Joslin & Muller, 2016). For this study, the researcher used method triangulation, which consisted of collecting data from semi-structured interviews, documents and archival records (Carter et al., 2014). By using interviews, the researcher obtained detailed information from senior leaders about their experiences from succession planning events (Carter et al., 2014). The data collected through interviews allowed the researcher to take a flexible approach by asking probing or follow-up questions during the interviews (Carter et al., 2014). Moreover, the

researcher collected documents, reviewed and analyzed historical archival records, which helped to establish triangulation (Fusch et al., 2018).

Summary of the Nature of the Study

The researcher conducted a multiple-case study research design for this study. The case study method allowed the researcher to explore the selection process of executive leaders and the factors that contributed to the potential success or failure of succession planning. For this study, the constructivism paradigm enabled the researcher to interact with participants through one-on-one conversations to gain their perspective of executive leadership selection and succession planning efforts within Ohio's faith-based organizations (Lincoln & Guba, 2013). Additionally, the researcher interacted with participants by scheduling interviews to speak with participants about the topic of succession planning for executive leadership positions (Yin, 2018). A qualitative research design was an appropriate method for this study because it required the researcher to collect data through interviews, documents, and archival records better to understand the phenomenon (Yin, 2018).

The research questions were designed to understand previous succession planning events within Ohio's faith-based organizations (Carter et al., 2014). The researcher's objective for this study was two-fold: (a) to understand the executive leadership selection process, and (b) to understand the potential success and failure of succession planning. To understand the candidate selection process for executive leadership positions, the researcher needed to understand the recruitment methods faith-based organizations used to hire a candidate (Heneman et al., 2019). To understand the potential success and failure of succession planning, the researcher needed to explore how the process was efficient and effective (Miller, 2018). A multiple-case study allowed the researcher to explore and identify the common themes that described the complexity

of succession planning for executive leadership positions at Ohio's faith-based organizations (Yin, 2018).

Alternatively, a quantitative design would not work for this study because fixed design methods required collecting data with surveys and questionnaires to perform numerical analysis to understand the phenomenon (Martella et al., 2013). Although the researcher used theories to help guide this study, the researcher did not use hypotheses to prove or disprove relationships between variables (Leavy, 2018). Instead, the researcher assigned codes to words to help identify the patterns and themes relevant to the participants' experiences (Yin, 2018). The research questions were not deductive and did not explain the difference between independent or dependent variables (Leavy, 2018). However, the research questions for this study were inductive and used concepts and constructs to generate meaning as opposed to numerical terms (Leavy, 2018).

Furthermore, a mixed-methods research design was incompatible for this study because the researcher did not use a combination of flexible and fixed research designs (Creswell & Plano Clark, 2018). Additionally, the researcher did not integrate qualitative and quantitative data collection methods (i.e., interviews and questionnaires) to perform a sequential or concurrent analysis to help better understand the phenomenon (Creswell & Plano Clark, 2018). Moreover, the research questions were not designed to compare and contrast data collected from qualitative and quantitative approaches used in mixed-methods studies (Creswell & Plano Clark, 2018). Although the research questions for this study were designed using a qualitative approach, the integration of quantitative methods required for mixed-methods research designs to clarify or expand on the phenomenon was not used (Creswell & Plano Clark, 2018).

Conceptual Framework

The conceptual framework designed for this study illustrated the relationship between decision makers within Ohio's faith-based organizations and the executive leadership selection and succession planning processes. The researcher's objective was to explore two processes: (a) executive leadership selection and (b) succession planning. The conceptual framework for this study helped the researcher answer the research questions for a qualitative multiple-case study. The information acquired for the research questions was two-fold: (a) to understand the executive leadership selection process and (b) to understand the potential success or failure to implement the succession planning processes for executive leadership positions. As shown, Figure 1 revealed the series of events that could take place during the executive leadership selection and succession planning processes.

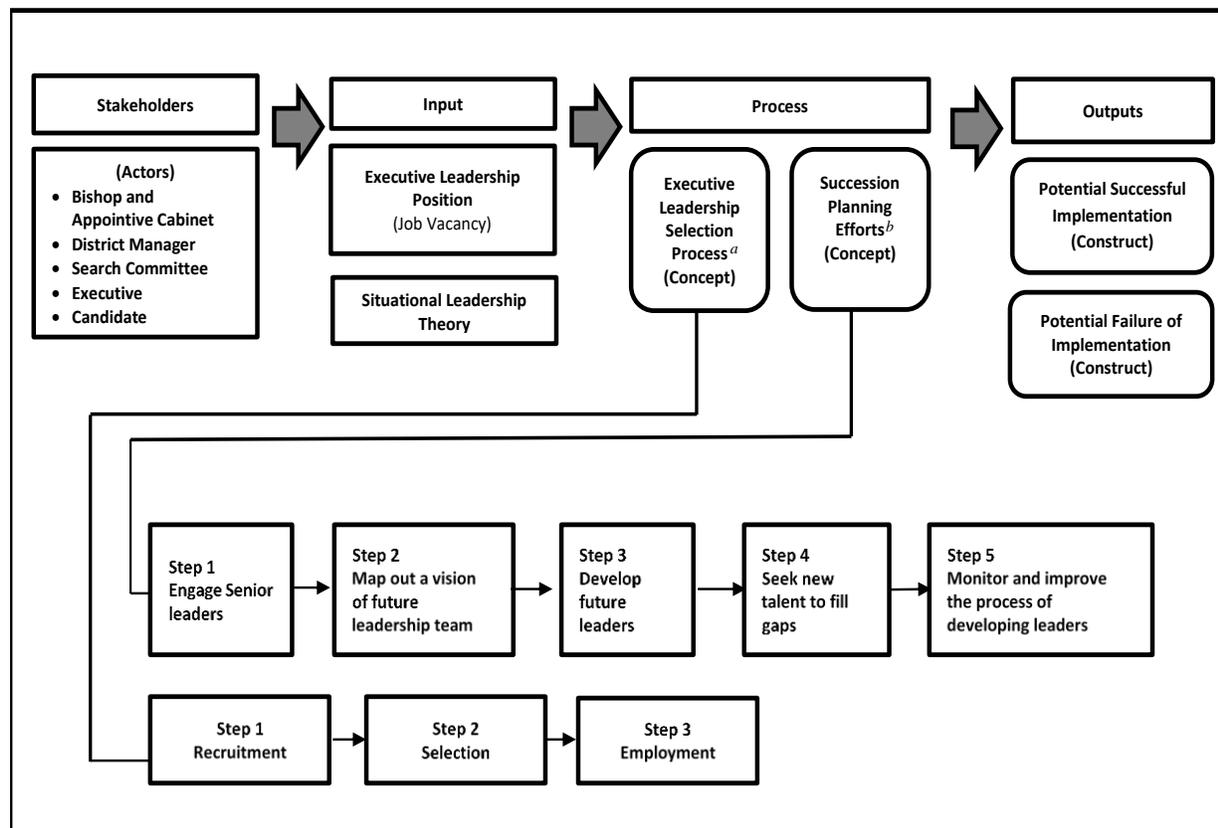


Figure 1. Relationships Between Concepts, Theories, Actors, and Constructs

Note. This original figure created by the author shows the categories necessary for recruiting, identifying, and selecting future executive leaders within Ohio's faith-based organizations. The data for the executive leadership selection process ^a are from *Staffing Organizations* by H.G. Heneman, T.A. Judge, and J. D. Kammeyer-Mueller, 2019, pp. 21. Copyright by McGraw Hill Education. The data for succession planning efforts ^b are from *What's your Plan A for growing future leaders* by K. Kramer and P. Nayak, 2013, pp. 26-39. Copyright by The Bridgespan Group.

Concepts

Executive Leadership Selection Concept. The phrase *executive leadership selection concept* was used in this study's conceptual framework represented the processes Ohio's faith-based organizations used for staffing executive leadership positions. As Heneman et al. (2019) explained, staffing for future positions consisted of three steps: (a) recruitment, (b) selection, and (c) employment. The first step was the recruitment stage, which the organization identified job vacancies, the skills and competencies required for the position, and engaged in attracting

potential candidates (Heneman et al., 2019). The second step was the selection stage, which involved assessing and evaluating the candidate (Heneman et al., 2019). For this study, the majority of candidates that were recruited and selected for executive leadership positions came from Ohio's faith-based organizations existing leadership pool or their affiliated graduate schools. Last, the third step was the employment stage, which involved organizational decision-makers offering the candidate the position, and the candidate accepting employment (Heneman et al., 2019). Candidates were appointed after they accepted the positions. Additional information about the findings related to the recruitment, selection, and employment for executive leadership positions is discussed in Section 3.

Succession Planning Efforts Concept. The phrase *succession planning efforts concept* was used in this study's conceptual framework as the second process faith-based organizations conducted for staffing executive leadership positions (Kramer & Nayak, 2013). As Kramer and Nayak (2013) explained, succession planning and management encompassed of five steps: (a) engaging senior leaders, (b) mapping out a vision of the future leadership team, (c) developing future leaders, (d) seeking new talent, and (e) monitoring and improving the process of developing leaders. Kramer and Nayak (2013) noted the first stage for succession planning activities was engaging senior leaders to discuss the importance of succession planning. For this study, the engagement of section leaders included a joint effort between the bishop and appointive cabinet and the district manager who held the initial discussion about succession planning activities. The second stage in the succession planning process was to design a vision of the future leadership team (Kramer & Nayak, 2013). Ohio's faith-based organizations formed a search committee to assess potential candidates for executive leadership positions. The third stage of the succession planning process was to develop future leaders by identifying the missing

skills and competencies and create a plan to address them (Kramer & Nayak, 2013). For this study, the search committee was responsible for ensuring executives within the respective branches met the skillsets required for executive leadership positions. The fourth stage of the succession planning process was to seek new talent (Kramer & Nayak, 2013). For this study, the task of seeking new talent was a joint effort between the district manager and the search committee, which were responsible for identifying potential prospects for leadership positions from within their internal branches. Last, the fifth stage was to monitor and improve the processes of developing leaders (Kramer & Nayak, 2013). For this study, monitoring and improving the leadership development process required a joint effort between the search committee and an executive leader.

Theories

Hersey and Blanchard's (1993) situational leadership theory were used as a tool for this study to understand the linkage between the decision-makers' leadership style, the process, and the potential outcomes. According to Hersey and Blanchard (1993), leadership was responsible for offering direction and ensuring its followers had the knowledge, skills, and resources needed to execute a task correctly. Subsequently, the situational leadership theory indicated there were four leadership styles leaders used in a leader-follower relationship: (a) directing-telling, (b) coaching-selling, (c) supporting-participating, and (d) delegating (Blanchard et al., 2013). In the first quadrant, the directing-telling role, the leader provided specific instructions about the goals while closely monitoring the follower's performance (Blanchard et al., 2013). In the second quadrant, the coaching-selling role, the leader sets all the goals and consulted with the follower (Blanchard et al., 2013). In the third quadrant, the supporting-participating role, the leader assumed the person knew how to set the goals; therefore, the leader supported and encouraged

the follower (Blanchard et al., 2013). In the fourth quadrant, the delegating role, the leader empowered the follower to act independently with the appropriate resources to get the job done (Blanchard et al., 2013). Further, the situational leadership theory suggested that leaders had the flexibility to adjust their leadership styles to the needs of followers, and that no leadership style was better than the other (Hersey & Blanchard, 1993).

Actors

The phrase *stakeholders* were used to depict the actors in this study's conceptual framework and included: (a) the bishop and appointive cabinet, (b) the district manager, (c) the search committee, (d) the executive, and (e) candidate. Stakeholders were the individuals involved in the recruitment process for executive leadership positions at Ohio's faith-based organizations (Heneman et al., 2019; Stewart, 2016; Worth, 2019). An executive leader was the person responsible for an organization's management and day-to-day operations. The bishop and appointive cabinet, and the district manager was a group of individuals responsible for the governance of a non-profit organization. The search committee were a group of individuals responsible for hiring, administration, and training staff. Finally, the candidate was an individual being considered for employment at the organization. For this study, candidates were recruited from universities affiliated with Ohio's faith-based organizations.

Constructs

Potential Successful Implementation Construct. The phrase *potential successful implementation construct* was used in this study's conceptual framework as one of the outcomes of the succession planning process that constitutes a successful implementation. Word and Sowa (2017) stated that successful succession planning and management required sponsorship from the organization's executive leaders. In addition, succession planning required a joint effort between

the executive leader and the board of directors, in which both parties were expected to hold discussions concerning the future of the non-profit organization (Li, 2018; Stewart et al., 2020). Subsequently, if an internal candidate was identified, the executive leader and the candidate worked together to ensure a smooth transition (Santora et al., 2019). Nevertheless, if an external candidate was chosen, the non-profit board and the future candidate worked together on the succession plan (Cahill, 2016). For this study, the groups of individuals (i.e., bishop and appointive cabinet, district manager, and the search committee) involvement in succession planning efforts were key to generating a potential successful implementation. Additional information about the findings as they relate to a potential successful implementation is located in Section 3.

Potential Failure of Implementation Construct. The phrase *potential failure of implementation construct* was used in this study's conceptual framework as one of the outcomes of the activity of the succession planning process that constitutes a failure to implement. Succession planning projects failed when there was poor planning and miscommunication amongst the stakeholders (Hunter & Decker-Pierce, 2021; Stewart & Twumasi, 2020; Varhegyi & Jepsen, 2017; Vito, 2018). Examples from the scholarly literature about a failure to implement the succession planning process included: (a) being temporarily left without an executive leader, (b) unable to identify qualified candidates within the existing leadership pipeline, and (c) difficulties in the recruitment and search process (Hunter & Decker-Pierce, 2021; Stewart & Twumasi, 2020; Varhegyi & Jepsen, 2017; Vito, 2018). For this study, an example of failure to implement succession planning activities were that decision makers felt they were time-consuming. Additional information about a failure to implement succession planning construct is discussed in Section 3.

Relationships Between Concepts, Theories, Actors, and Constructs

As depicted in Figure 1, the actors (stakeholders) executed the process for the job category of the executive leadership position. At Ohio's faith-based organizations the bishop and appointive cabinet, the district manager, and the search committee were the groups of individuals responsible for identifying a successor for the executive leadership position. The theory (situational leadership) determined which of the four types of leadership styles (i.e., directing-telling, coaching-selling, supporting-participating, and delegation) the facilitator used with the followers to effectively complete the task. In this case, the task was selecting an executive leader and implementing succession planning practices for Ohio's faith-based organizations. The concepts (executive leadership positions and succession planning efforts) represented the processes the stakeholders used to find a qualified candidate (Heneman et al., 2019; Kramer & Nayak, 2013). The constructs (potential successful implementation and potential failure of implementation) represented the outcomes of the stakeholder's preparedness in executing the succession planning process (Hunter & Decker-Pierce, 2021; Stewart & Twumasi, 2020; Varhegyi & Jepsen, 2017; Vito, 2018; Word & Sowa, 2017).

Summary of the Research Framework

The conceptual framework used in this study assisted the researcher with exploring the executive leadership selection and succession planning processes for executive leadership positions at Ohio's faith-based organizations. The concepts used for this study (executive leadership selection and succession planning efforts) were two-fold. First, the executive selection process highlighted the steps decision makers used when searching for suitable candidates (Heneman et al., 2019). Second, the succession planning efforts portrayed the series of events decision makers used to implement succession planning for executive leadership positions

(Kramer & Nayak, 2013). The theory (situational leadership theory) was used to help the researcher better understand the behaviors and actions the stakeholders employed when executing the executive leadership selection and succession planning processes. The actors (i.e., stakeholders) used for this study included: (a) the bishop and appointive cabinet, (b) the district manager, (c) the search committee, and (d) the executive. The constructs (potential successful implementation and potential failure of implementation) used for this study assisted the researcher with understanding the potential outcomes of the succession planning process.

Definition of Terms

Bishop and Appointive Cabinet. A group of individual responsible for the appointment of an executive leader (Torry, 2016).

Board of Directors. A group of individuals responsible for the governance of a non-profit organization (Stewart, 2017).

Career Advancement. The movement between a series of jobs within a career (Stewart & Kuenzi, 2018).

Community Volunteer. An individual that does unpaid work at an organization to help another individual, group, or the environment (Bowe et al., 2020).

Executive Leader. An individual who fills a top leadership position at an organization (Stewart & Kuenzi, 2018).

Faith-based Organization. A non-profit organization founded by a religious group or centered around religious principles (Torry, 2016).

Gatekeeper. An individual who has the power to grant or withhold access to people or documents at an institution under their formal care (Andoh-Arthur, 2020).

Leadership Pipeline. A list of job candidates qualified to replace executive leaders (Henemen et al., 2019).

Search Committee. A group of individuals brought together for the sole purpose of recruiting and selecting qualified candidates to fill vacant positions at an organization (Kazmi et al., 2021).

Succession Planning. A plan to identify employees who will be considered for promotions in key positions within an organization (Henemen et al., 2019).

Assumptions, Limitations, Delimitations

A researcher undertakes assumptions to be true and relevant for a research study (Simon & Goes, 2018). Failing to justify assumptions resulted in researchers being unable to address the research problem, answer the research questions, or explain the steps taken to establish credibility (Simon & Goes, 2018). Moreover, researchers employed risk mitigation procedures to protect the safety and well-being of the participants (Simon & Goes, 2018). Limitations are constraints beyond a researcher's control and discloses any weakness found in the study (Creswell & Poth, 2018). Failing to disclose limitations would inaccurately depict the study's results (Creswell & Poth, 2018). To mitigate the risk, the researcher needed to put in control measures that maximize the credibility and dependability of the study (Creswell & Poth, 2018).

Further, delimitations helped narrow the scope by placing a boundary around the study to exclude what was not being covered (Baxter & Jack, 2008). Failing to limit the scope would cause a researcher to answer research questions that are too broad for the study (Baxter & Jack, 2008). In qualitative multiple-case studies, the researcher binds the case according to timeframe, activity, place, definition, and context (Baxter & Jack, 2008; Creswell & Poth, 2018; Merriam &

Tisdell, 2016; Yin, 2018). For this study, the researcher bounded the case by using a specific timeframe and place, which explored the departure and arrival of Ohio's faith-based leaders.

Assumptions

There were three assumptions identified for this study. The first assumption was the participants selected for this study provided accurate and unbiased accounts of their experience with succession planning for executive leadership positions (Kramer & Nayak, 2013). The risk for this assumption was not all of the participants reported their beliefs and attitudes accurately (Robson & McCartan, 2016). Therefore, to mitigate the risk, the participants were confidential, and they had the ability to withdraw from the study at any time without recourse (Simon & Goes, 2018).

The second assumption was participants selected for this study were knowledgeable about the succession planning process for executive leadership positions (Word & Sowa, 2017). The risk was the researcher found it challenging when identifying the final cases (Yin, 2018). To mitigate the risk, the researcher needed to conduct a one-phased or two-phased screening procedure to identify the final cases properly (Yin, 2018). Yin stated in a one-phase approach, the candidates served as the case (i.e., organizations, individuals, or some other entity), and the screening consisted of querying people knowledgeable about each candidate. The researcher defined the criteria for identifying candidates to determine eligibility to serve as a case. For a two-phased approach, the first phase consisted of collecting information about the entire pool of candidates from an archival source (i.e., statistical database) (Merriam & Tisdell, 2016). Yin (2018) recommended researchers reduce the number of candidates to 12 or fewer and conduct screening procedures to determine their eligibility to participate in the study.

The third assumption was participants selected for this study represented faith-based organizations in the state of Ohio (Word & Sowa, 2017). The risk was the sample size did not accurately represent the population being studied (Robson & McCartan, 2016). The researcher used replication logic to mitigate the risk where each case became the subject of the entire case study (Yin, 2018). First, the researcher conducted a summary report indicating how and why a particular proposition was not demonstrated (Merriam & Tisdell, 2016). Second, the researcher conducted two to three individual cases on similar topics to predict similar results (Yin, 2018). Yin (2018) stated that only two to three might be literal replications, whereby four to six was used to pursue two different patterns of theoretical replications.

Limitations

The researcher identified three limitations for this study (Baxter & Jack, 2008; Creswell & Poth, 2018; Riddler, 2017; Yin, 2018). The first limitation was the researcher only worked with participants who had completed succession planning activities for executive leadership positions (Word & Sowa, 2017). The risk was the researcher had to rely on the participants recollection of what happened during the event (Simon & Goes, 2018). To mitigate the risk, the researcher avoided asking the participants leading questions and refrained from disclosing sensitive information (Merriam & Tisdale, 2016).

The second limitation was qualitative multiple-case studies have a small sample size, limiting its generalizability (Creswell & Poth, 2018). The risk was the number of cases would not be deemed necessary or sufficient for the study (Yin, 2018). The researcher continued the study until the number of individual cases had reached data saturation (i.e., when no new themes or information arise) to mitigate the risk (Baxter & Jack, 2008). After data collection, the

researcher synthesized the findings based on information provided from the sources (Baxter & Jack, 2008).

The third limitation was multiple-case studies involved more than one single-case (Yin, 2018). Therefore, the risk was the researcher found it challenging to replicate cases (Yin, 2018). Riddler (2017) stated that to mitigate the risk, the researcher had to use literal or theoretical replications to find support for the study. Additionally, Riddler indicated that literal replications were used to predict similar results, whereby theoretical replications are selected to predict contrasting results.

Delimitations

This study was limited to individuals residing in the state of Ohio, who were current or former employees, or volunteers for Ohio's faith-based organization (Torry, 2016; Word & Sowa, 2017). Creswell and Poth (2019) stated that participants chosen for a study must have experienced the same phenomenon. By limiting the study to those who have held employment, are currently employed, or volunteered for a faith-based organization helped the researcher with targeting the right participants for the study (Creswell & Poth, 2018). Excluding participants outside of a specific region impacted the results from the study because it did not accurately address the research problem for the entire sector (Hunter & Decker-Pierce, 2021). To address this delimitation, the researcher made an exhaustive effort to collect evidence that was relevant to the study (Yin, 2018). Additionally, the researcher obtained permission to be on-site, access to collect data for the study, and the ability to interact with participants within their natural setting (Creswell & Poth, 2018). Therefore, it was more desirable for the researcher to conduct the study within the limits of the state of Ohio.

Subsequently, this study was limited to the process used to select executive leaders and the potential success or failure to implement succession planning (Heneman et al., 2019; Kramer & Nayak, 2013). This study explored the potential lack of succession planning and the inability to identify future leaders (Ballaro & Polk, 2017; McKee & Froelich, 2016; Stewart et al., 2020). Including irrelevant information in the study could increase the complexity and produce a different outcome (Yin, 2018). Stake (1995) noted a researcher's obligation was to understand the case under the phenomenon being explored. Moreover, focusing exclusively on the highest level of management within an organization allowed the researcher to complete the case in an exemplary manner (Stewart, 2016).

Significance of the Study

The significance of the study was to explore the factors contributing to the implementation of succession planning for executive leadership positions. This study addressed the gaps in the literature two-fold: (a) it described the process used to select executive leaders and (b) the potential success or failure to implement succession planning. Additionally, this study integrated biblical principles for identifying future leaders (Deuteronomy 31:1-8, 34:9; Matthew 10:1-42, New World Translation). Further, this study benefited the field of business and the non-profit management and leadership cognate by building awareness about the importance of succession planning (McKee & Froelich, 2016).

Reduction of Gaps in the Literature

This study was designed to explore the selection process for executive leadership positions and the usage of succession plans at faith-based organizations. The factors used to select executive leaders was considered (Heneman et al., 2019). This multiple-case study shared the lessons learned from non-profit organizations that experienced difficulties identifying future

leaders (Stewart et al., 2020). Additionally, this study provided insight into how future leaders were given opportunities to advance within the organization (Stewart, 2017).

Another factor was the success or failure to implement succession planning for executive leadership positions. The researcher shared the practical tools that organizational decision-makers' used to provide structure and guidance for succession planning activities. Although board members perceived the process as effective, biases still existed amongst decision makers when deciding whether to participate in succession planning activities (Varhegyi & Jepsen, 2017). Academic scholars have found that some organizational decision-makers' felt the succession planning process was difficult, while others completed the task independently (Stewart et al., 2020; Stewart & Twumasi, 2020).

Additionally, this multiple-case study provided insight into how organizational decision-makers' engaged in the succession planning process and determine who was responsible for leading it (McKee & Froelich, 2016). The academic literature depicted there was a growing debate amongst non-profit decision-makers' about whether engaging in succession planning activities were necessary (Hunter & Decker-Pierce, 2021; McKee & Froelich, 2016; Santora et al., 2019; Stewart, 2016; Stewart et al., 2020). On the one hand, decision-makers' suggested succession planning was unnecessary because they did not anticipate replacing their leader any time soon (Hunter & Decker-Pierce, 2021; Stewart et al., 2020). On the other hand, decision-makers' implied succession plans were needed for the organization's continuity (McKee & Froelich, 2016; Stewart et al., 2020). Moreover, this study helped the researcher with understanding how a decision-maker planned to minimize the risks should the executive leader resign from the organization unexpectedly (McKee & Froelich, 2016).

Subsequently, this study explored the leadership style that contributed to the success or failure to complete a task. Exploring the group facilitator's leadership style during engagement of the succession planning process revealed the reasons behind the success or failure to implement (Silard, 2016). Furthermore, understanding the primary leadership style helped shed light on the group leader's level of influence within the non-profit organization (Bosse et al., 2017). For instance, Schlosser et al. (2017) noted there were power struggles amongst the chief executive and the board of directors when the executive leader wanted to initiate changes. As a result, rather than devising a strategy for the organization's growth, non-profit boards focused their attention on issues related to their mission (Schlosser et al., 2017). Alternately, Stewart et al. (2020) reported that chief executives had the flexibility to make adjustments for the non-profit organization where board members agreed on all the decisions proposed by the executive.

Implications for Biblical Integration

This study integrated a Biblical perspective about the concept of preparing for leadership succession. In the academic literature, understanding the reason behind nonprofit chief executive resignations was complex (Stewart et al., 2020). However, four broad areas surrounding chief executive separations consisted of: (a) voluntarily resignations, (b) coerced into stepping down by the board of directors, (c) health reasons, or (d) death (Hunter & Decker-Pierce, 2021; Li, 2018; McKee & Froelich, 2016; Norris-Tirrell et al., 2018; Stewart & Kuenzi, 2018). An example from the Old Testament surrounding leadership transition is depicted in the story of Moses and Joshua (Deuteronomy 31:1-8, 34:9). In the story, God explained that Moses would die and there would be a transfer of power amongst the nation of Israel (Deuteronomy 31:1-32:47; Deuteronomy 34:1-5). Joshua followed Moses on different occasions and was given assignments where he demonstrated his leadership skills (Exodus 17:9-14). By the time Joshua

was ready to transition into his new leadership role, he was fully prepared, and the people were ready to accept him (Deuteronomy 34:9). After Moses departed the earth, Joshua was named as the successor and responsible for leading the people (Deuteronomy 31). The academic literature noted that in the non-profit sector, preparing for a successor involved the current executive leader's assistance (Stewart, 2016). Similarly, Stewart et al. (2020) reported that former chief executives groomed their successors.

In the New Testament, the story of Jesus and the twelve (12) apostles was another example of leadership succession that was viewed from a Biblical perspective (Matthew 10:1-42). The scriptures conveyed those decisions surrounding new leadership appointments is a work in progress. For instance, Jesus spent the night in prayer before finalizing his decision when it came to choosing the apostles (Luke 6:12-16). Subsequently, the academic literature noted that identifying future leaders was a lengthy process that should not be rushed (Stewart et al., 2020). Often, non-profit boards were uncomfortable with discussing topics centered around replacing their chief executive, especially when the individual was the founder of the non-profit organization (Stewart, 2017). Succession planning ensured non-profit organizations continued its mission beyond the lifespan of its founding officers (McKee & Froelich, 2016). Similarly, the scriptures teach that leadership succession is important for continuing the mission. For instance, before Jesus departed the earth, he commanded his apostles to continue their work and train others on how they could become disciples as well (Matthew 28:18).

Benefit to Business Practice and Relationship to Cognate

The field of study for this research was business administration with a non-profit leadership and management cognate. The topic of succession planning for executive leadership positions was related to the field of business and the cognate because focused on strategic

workforce planning (Heneman et al., 2019). This multiple-case study offered opportunities to build awareness about the importance of selecting candidates for executive leadership positions within a faith-based organization (McKee & Froelich, 2016). Non-profit organizations were losing their employees to competitors; therefore, executive leaders were emphasizing leadership development programs (Slatten et al., 2020). A significant amount of research has been conducted on the topic of succession planning for executive leadership positions within the field of health and human services; however, little attention was drawn to faith-based organizations (Norris-Tirrell et al., 2018; Santora et al., 2019; Stewart & Kuenzi, 2018; Vito, 2018). This study provided insight into the strategies used by faith-based organizations to identify future leaders.

In terms of implementing the succession planning process, this multiple-case study explored an individual's leadership style while leading the succession planning activity (Hersey & Blanchard, 1993). Additionally, this study described an individual's specific knowledge and skills while leading (Kramer & Nayak, 2013). Understanding the leadership style determined whether projects lead to a specific outcome (Silard, 2018). Moreover, exploring the leadership types helped the reader determine which style was the most effective in a particular environment or situation (Bosse et al., 2017).

Further, this study bridged the gap by discussing some of the criticisms concerning whether succession plans were suitable for various organizations within the non-profit sector (Stewart & Kuenzi, 2018). The academic literature highlighted that non-profit organizations were pressured to adopt business-like practices that helped them to become more commercialized, instead of an entity that focuses on mission-related activities (Maier et al., 2020). Business-like practices included processes and procedures within the organization (Maier et al., 2020). On one side, decision makers were unwilling to be involved in the succession

planning process because they did not perceive preparing for future leaders was an urgent concern (Stewart & Kuenzi, 2019). On the other side, some decision makers perceive succession planning as vital because the organization should be preparing for the future (McKee & Froelich, 2016). Although this study was limited to faith-based organizations, the researcher hoped others would learn more about succession planning for executive leadership positions.

Summary of the Significance of the Study

The significance of the study focused on executive leadership selection and succession planning processes within faith-based organizations. The researcher believes the assumptions were true within the study (Simon & Goes, 2018). Moreover, the limitations were weaknesses the researcher identified within the study (Creswell & Poth, 2018). Additionally, the delimitations narrowed the study's scope and placed a boundary on what the study covered (Yin, 2018). The significance of the study focused on the factors by which faith-based organizations used to select an executive leader.

Additionally, this study explored a decision maker's potential success or failure to implement succession planning (Hersey & Blanchard, 1993). This study used Biblical integrations by providing examples of leadership successions through the stories depicted in the Old and New Testament (Deuteronomy 31:1-8, 34:9; Matthew 10:1-42). Further, this study benefited the field of business, specifically the non-profit leadership and management cognate, by building awareness about the importance of succession planning and preparing for future leadership (McKee & Froelich, 2016).

A Review of the Professional and Academic Literature

The literature review was based on the conceptual framework designed for this study and presented from a thematic viewpoint. An exhaustive search was conducted to find professional

and academic literature related to executive leadership selection and succession planning for executive leadership positions within faith-based non-profit organizations. The researcher reviewed and analyzed scholarly peer-reviewed journal articles, professional articles, and academic books that approached the aspects of executive leadership transitions and succession planning. Specifically, this literature review sought to explore the scholarly research related to this study's three guiding research questions:

RQ1. What are the factors used by faith-based organizations to select executive leaders?

RQ2. What factors contribute to the successful implementation of succession planning efforts for executive leadership positions at faith-based organizations?

RQ3. What factors contribute to the failure of succession planning efforts for executive leadership positions at faith-based organizations?

The literature review is divided into five sections based on the conceptual framework designed for this study. The first two sections discussed the concepts (a) executive leadership selection, and (b) succession planning efforts, and the themes found in the academic literature. The first section, titled *executive leadership selection*, discusses former non-profit executive leaders' career path to top positions. Emphasis is placed on the scholarly research surrounding the unique experiences of former executives, their decision to invest in a non-profit career, and the strategies they used to get appointed by non-profit boards. Additionally, the experiences of future leaders (i.e., non-profit graduate students), internal and external stakeholders, and the aspects of leadership development within the non-profit sector is further discussed.

The second section, titled *succession planning efforts concept*, highlights significant research surrounding the experiences of non-profit board members during executive leadership transitions. This review discussed the literature surrounding the non-profit board members'

preparation, lessons learned, solutions, and various aspects of engaging in succession planning activities. The third section of this literature review focuses on the theories used to help guide this study. Hersey and Blanchard's (1993) situational leadership theory are used to gain a better understanding of the factors (i.e., leadership style) that can impact a leader's ability to get a task (i.e., succession planning) completed. Utilizing the situational leadership theory assisted in obtaining information regarding the leadership style used by the group facilitator during succession planning activities at Ohio's faith-based organizations. The fourth section focuses on the constructs titled (a) *potential successful implementation* and (b) *potential failure of implementation* and discussed the factors that contribute to succession planning performance outcomes. These four sections provided a holistic view of the research related to the current body of knowledge surrounding executive leadership selection and succession planning efforts within faith-based non-profit organizations. The literature review concludes with a discussion of related studies conducted by professional associations and the themes relevant to succession planning for executive leadership positions within the non-profit sector.

Business Practices

The commonly held assumption within the literature was non-profit boards were not taking succession planning seriously, except for when they felt pressured by external stakeholders, and there was a lack of investment in leadership development programs sector-wide (Griffith, 2016; Hunter & Decker-Pierce, 2021; Miller, 2018; Stewart & Kuenzi, 2018; Stewart et al., 2020; Vito, 2018). Board members' attitudes toward the succession planning process determined whether they thought it was meaningful. First, they were hesitant about engaging in the process because they felt their existing leader was irreplaceable (Stewart, 2016; Stewart, 2017; Varhegyi & Jepsen, 2017). Second, decision makers experienced implications

with role clarity regarding the scope for succession planning activities, and it was unclear about who (i.e., executive leader, board of directors, and HR) should perform specific tasks (Barton, 2019; McKee & Froelich, 2016; Pratt et al., 2018; Stewart, 2016; Stewart, 2017; Stewart et al., 2020; Varhegyi & Jepsen, 2017). Subsequently, there was contention between which decision maker had the capacity to manage the succession planning process and why others were not capable (Barton, 2019; Kuenzi & Stewart, 2017; Stewart, 2016; Stewart et al., 2020). Most importantly, decision makers' misunderstood the purpose of succession planning because they felt compelled to rush the process to find a new leader (Stewart, 2016; Stewart, 2017). Non-profit boards from large organizations used third-party recruitment firms, while non-profit boards from small organizations hired individuals from their personal networks, bypassing individuals within the existing leadership pipeline (Stewart, 2017; Biu, 2019; Norton & Linnell, 2016).

Career growth required updating leadership skills on a consistent basis, and as more executive leaders continued to retire, organizations were becoming desperate to find replacements expeditiously (Hunter & Decker-Pierce, 2021; Norris-Tirrell et al., 2018; Stewart & Kuenzi, 2019). Educational institutions played a significant role in helping develop talent for non-profit leadership pipelines by designing programs to help graduate students obtain the knowledge and skills required for promotions (Nelson, 2018; Rooney & Burlingame, 2020). Likewise, scholars and practitioners provided solutions to help the non-profit sector navigate the complexity of succession planning (Adams, 2017; Santora, 2019). Although studies surrounding the topic of succession planning and executive leadership positions in non-profit organizations were robust, opportunities still existed to better understand the executive leadership selection process within faith-based organizations (Adams, 2017; Barton, 2019; Stewart & Twumasi, 2020).

The Problem

The general problem addressed was the lack of succession planning at non-profit organizations, resulting in the inability to identify future leaders. McKee and Froelich (2016) stated several non-profit organizations knew their chief executive officer was planning to retire within the next four years, but refrained from hiring an internal candidate qualified for the position. Ballaro and Polk (2017) noted organizations could not identify employees ready for promotion because there was no plan to assess competencies required for leadership positions. Stewart et al. (2020) found that 59% of non-profit organizations were left an average of six months without an executive leader as they failed to appoint an interim executive leader. The specific problem addressed was the potential lack of succession planning at faith-based non-profit organizations within the State of Ohio, resulting in the potential inability to identify future leaders.

Concepts

Executive Leadership Selection Process Concept. Researchers have conducted studies related to the strategies used by individuals to reach the CEO position (Kuenzi & Stewart, 2021; Norris-Tirrell et al., 2018; Stewart & Kuenzi, 2018). Norris-Tirrell et al. (2018) aimed to understand the career trajectories of current top leaders in non-profit organizations. The researchers performed a quantitative study consisting of 12 U.S. based national organizations operating in the health and human services areas. They used a random sample of LinkedIn profiles consisting of local and regional leaders to obtain 272 participants serving in the executive leadership role. Among the sample, 84 participants were described as non-profit mission enthusiasts, 84 participants were described as sector switchers, and 104 participants were described as non-profit career climbers. The findings revealed there was no direct path to reach

an executive leadership position and individuals could start their career in one sector and transfer to the non-profit sector to work their way up to the top position. The strategies used by participants to obtain the CEO position was spending some or all of their career in the non-profit sector, holding jobs at organizations with similar mission areas, obtaining graduate education, and relocating for the position.

Expanding the literature, Stewart and Kuenzi's (2018) quantitative study examined the career trajectories of executive leaders and investigated whether their career moves were intentional or if they received promotions. Data collection occurred using a survey and secondary internet-based information collected from LinkedIn, non-profit websites, 990 IRS filings, and GuideStar, and general internet searches. The sample comprised of 56 executives from 150 non-profit organizations operating in the top 20 largest metropolitan statistical areas in the United States. Study results showed executives had 32 years of experience across five positions. The executives spent the fewest years in non-management positions and more time in the management and executive leadership roles. Forty percent (40%) of executives had at least one internal promotion and 68.6% were not an employee when they were appointed. Moreover, thirty-nine percent of the executives had professional experience in the for-profit sector and 33.7% had experience in the public sector. Further, there were 46.5% of executives that spent their entire career in the nonprofit sector and the remaining had experience in either the public sector, for-profit sectors, or both. Other findings suggested there were mixed reviews between whether an executive's career movement was intentional or if the person was promoted. The researchers suggested the career of non-profit executives was highly individualized to the person holding the position and the organization hiring the executive.

Additional studies examined the relationship between the career trajectories of executive leaders and their professional credentials (i.e., degrees and certifications) and work experience (Kuenzi & Stewart, 2021). Kuenzi and Stewart's quantitative study used Bartlett's (2011) human capital theory to investigate the personal factors that helped expedite the ascension of nonprofit professionals to the executive leadership position. The random sample included 295 American Society of Association Executives (ASAE) organizations (100 ASAE members and 195 non-members). Using data collected from previous studies, (Smith & Martinez-Moyano, 2015; Stewart & Kuenzi, 2018), the researchers used elements consisting of the non-profit executive career paths, position type, employment sectors, educational degrees, and professional affiliations (Kuenzi & Stewart, 2021). Findings from the survey showed 26.5% of the association executives prior work experience was in the nonprofit sector only, 18.8% in the nonprofit and private sectors, 11.4% worked all three sectors, 9.7% in the private sector only, and 4.3% in the public or private sectors. Other findings revealed individuals with experience in the nonprofit sector reached the executive positions sooner than those in the two sectors combined. Moreover, executives holding advanced degrees, management-related degrees, credentials related to the mission field, prior experience, or second in command did not help expedite their pathway to executive leadership.

The studies conducted on the topic of career trajectories of executive leaders related to this study because they provided the process executive leaders used to advance their career within the nonprofit sector (Kuenzi & Stewart, 2021; Norris-Tirrell et al., 2018; Stewart & Kuenzi, 2018). The researchers gave a perspective from the viewpoint of non-profit executive leaders, which helped develop an understanding of the trends associated with the executive's educational background, credentials, tenure, and related experience for the position (Kuenzi &

Stewart, 2021; Norris-Tirrell et al., 2018; Stewart & Kuenzi, 2018). Scholars have argued there was no one path to the executive leadership position and there are various ways to reach top positions no matter which sector the individual originated from (Kuenzi & Stewart, 2021; Norris-Tirrell et al., 2018; Stewart & Kuenzi, 2018). This qualitative multiple-case study provided in-depth discussions surrounding the topic of executive leadership positions, which helped focused on the first research question: What factors are used by faith-based organizations to select executive leaders (Kuenzi & Stewart, 2021; Norris-Tirrell et al., 2018; Stewart & Kuenzi, 2018).

Characteristics and Competencies of Non-profit Executive Leaders

Researchers focused on the characteristics and competencies of executive leaders and the most important skillsets for the executive leader to possess (Kuenzi & Stewart, 2017). Kuenzi and Stewart's (2017) quantitative study applied the upper echelon's theory to explore the relationship of personal and professional characteristics of nonprofit executives on financial performance of their organization. The sample size included 69 non-profit executives representing the top 20 largest U.S. Metropolitan Statistical Areas in the health and human services area. Data on the personal and professional backgrounds was collected from internet-based surveys, information gathering websites, and Dillaman's (2000) mixed mode survey design by. Findings from the study revealed there was no statistical relationship between finances and (a) professionalization, (b) experience in the sector, (c) executive tenure, (d) external orientation, and (e) sector experience. Kuenzi and Stewart depicted a statistically significant relationship between the number of years executive leaders spent in the sector prior to their current executive position and the efficiency of the non-profit organization.

Desrosiers et al.'s (2018) qualitative study added to the literature examining the leadership practices among non-profit organizations in the midwestern region of the United

States. Specially, the researchers aimed to describe the differences between leaders with social work degrees and non-social work degrees. Through a non-probability sample, data was collected from 94 non-profit organizations and 85 individuals from websites and telephone interviews. Findings from their study included eight themes from individuals with degrees in social work:

1. Leaders must have experience and knowledge in their field (n = 10)
2. Leaders nurture their staff (n = 11)
3. Communication, both sending and receiving (n = 10)
4. Leaders foster independence and trust (n = 8)
5. Leaders are self-aware and emotionally intelligent (n = 7)
6. Leaders must demonstrate character and integrity (n = 6)
7. Leaders are effective decision makers (n = 6)
8. Leaders are visionary and had a strong vision (n = 4).

The researchers noted professionals with social work backgrounds lacked the skills to help them manage and run the organization in the early stages of their careers. Other findings suggested there were similarities and differences amongst the two groups. Both groups highlighted the importance of leaders providing support for their staff. Non-profit social-work participants prioritized the effective leadership and management of the organization, whereby social workers were more concerned about meeting the needs of clients. Furthermore, social work and non-social work participants highly valued communication skills and leadership by example. The researchers concluded that individuals with degrees in social work and non-social had more similarities than differences.

Bish and Becker's (2016) case study explored the expectations of capabilities of managers at different hierarchical levels at non-profit organizations in Australia. According to Bish and Becker, important task-oriented capabilities for managers were clarifying, planning, monitoring operations, and problem-solving. The researchers suggested relations-oriented capabilities consisted of supporting, developing, recognizing, and empowering groups of people to complete tasks together. They claimed change-oriented capabilities were advocating change, envisioning change, encouraging innovation, and facilitating collective learning to support the behaviors that sustain innovation. Bish and Becker suggested that external meta-category behavior needed to acquire the necessary resources, leaders needed have networking, external monitoring, and representing the organization. The researchers indicated managers needed to have personal knowledge and experience in the non-profit orientation.

Hunter and Decker-Pierce's (2021) study added to the literature on the professional and mission-related skills by describing the characteristics and competencies that non-profit executives would need in the future. The sample included executive directors, three senior managers, and board chairs representing 462 Human Service Organizations (HSOs) executive leaders in Ontario, Canada. Utilizing a survey made up of 29 closed and open-ended questions, the findings revealed there was the rise in the number of executives expected to retire within the next ten years. Other findings revealed the average tenure of executive leaders was 11.5 years with a low of one year and a high of 36 years. The study revealed that non-profit boards selected candidates for executive leadership positions with similar leadership profiles as the outgoing executive leader. Hunter and Decker-Pierce concluded that senior managers needed to develop specific characteristics and competencies if they wanted to thrive in the future and boards must be willing to fund more leadership development programs.

For this study, it was important to understand if non-profit boards selected executives based on specific characteristics and competencies related to the executive leader selection process within faith-based organizations (Hunter & Decker-Pierce, 2021). Several studies added to the topic because it implied that non-profit boards were not selecting executives based on their characteristics, educational background, and financial performance (Desrosiers et al., 2018; Kuenzi & Stewart, 2017). Rather, several researchers suggested non-profit boards identified tenure within the non-profit sector, and competencies consisting of task-oriented and relations-oriented behaviors were linked to the selection process (Bish & Becker, 2016; Kuenzi & Stewart, 2017). Hunter and Decker-Pierce's (2021) study was relevant to the topic because it implied that the characteristics and competencies of former leaders were no longer applicable for future leaders. This called for more discussions surrounding executive leadership selection for non-profit organizations. In alignment with the literature, the findings from the study revealed that faith-based organizations selected executives who they personally identified within their person networks and who was affiliated with their organization.

Non-profit Career Decision-making

Nelson's (2018) mixed methods study used the happenstance theory to assess the relationships between the early-life and pre-career experiences and non-profit career awareness of 337 members of the Young Professionals Network (YPN). Nelson stated 46% (n=139) of the participants' career aspiration was to have a non-helping career, and 35.1% (n = 106) wanted a helping career. Findings from Nelson's study revealed eight percent (n = 25) of the participants wanted a career in the public or non-profit sector, seven percent (n = 21) were interested in a career helping people, and five percent (n = 11) were unsure about their career. Nelson's work revealed 82% (n = 278) of the participants envisioned a career helping people, while 49.3% (n =

166) did not know that non-profit careers were an option when they were younger. Nelson implied 28.9% of the participants stated they volunteered in some form, and 14% always knew they wanted to help others. Nelson concluded volunteering at non-profit organizations led to a career of helping career or serving others, where individuals gained personal satisfaction.

Davis and Myers's (2018) quantitative study compared newcomers entering for-profit and governmental organizations to newcomers in the non-profit sector. The researchers conducted an online survey for 294 full-time employees with a tenure of three months or less. Davis and Myers's hypothesize that newcomers entering non-profit organizations reported a higher level of several dimensions of organization simulation (OA) in comparison to newcomers entering for-profit or governmental organizations. The researchers used a seven-point Likert scale based on Latack's (1984) Objective Magnitude of Career Transition Scale. Davis and Myers's reported newcomers entering non-profit organizations had higher scores than newcomers entering for-profit and government organizations. The researchers suggested there were significant differences between inexperienced newcomers and different organization types for (a) recognition, (b) job competency, (c) role negotiation, and (d) job competency than individuals working for-profit and government sectors. They stated there was partial support for experienced newcomers entering non-profit organizations with a low magnitude and adjusting to work as opposed to those working in for-profit and government agencies. The researchers concluded newcomers felt their work was important to the organization, contributed to the organization, and adapted to the workplace culture faster.

Schlosser et al.'s (2017) qualitative study on career cross-sector transition and rebranding interviewed 20 executives who transferred from the for-profit sector into the non-profit sector serving various types of non-profit organizations. They stated executives went through three

transitional stages (rebranding, adaptation, and synthesizing). The researchers claimed 30% of participants could not precipitate their choice to transition, while 70% were able to describe how the opportunity to become an executive presented itself. They indicated participants fell into five categories (a) competency driven, (b) altruistic, (c) personal priority driven, (d) disillusioned, and (e) sector-blind, which described the conditions that prompted the individual for working in the non-profit sector. The researchers concluded mid-to-late career professionals who decided to switch from the for-profit sector to a second career in the non-profit sector, provided attitudinal and behavior insights for career counseling and cross-over concepts.

Nelson's (2018) study was relevant to the executive selection process because it provided insight into the types of individuals within the non-profit sector. The findings demonstrate non-profit boards employed certain individuals because of their connection to the organization (Nelson, 2018). Several studies were relevant to this topic because they provided insight into the qualification of external candidates from the for-profit and government sectors as well as those transitioning into the non-profit sector (Davis & Myers, 2018; Schlosser et al., 2017). The findings from both studies indicated that non-profit boards were hiring external candidates with the presumption they had the skills required for leadership positions (Davis & Myers, 2018; Schlosser et al., 2017).

Executive Leadership Selection and Gender

As non-profit organizations continued to address succession planning efforts, the scholarly literature implied that individuals thought about career progression in different ways, including the lack of diversity in executive leadership positions. Flippen's (2017) study explored the career path of 240 women as they progressed to executive leadership positions within non-profit organizations. Flippen focused on the Gen X population (individuals born between 1965

and 1980) to assess the effect of gender bias and career success using the Everyday Discrimination Scale. According to Flippen, the sample included 32% males and 68% females from various ethnic backgrounds and roles from intern to CEO. The researchers stated 46% of females and 53% of males reported gender did not determine career success, 33% of females and 19% of males determined gender did matter, while 24% remained neutral. Flippen revealed that Gen X females viewed their career development through a multifaced approach to help them prepare for success, which included role competency and empowerment by management. She stated that hard work and the achievement of goals were essential for women's career advancement and in the role of performance. The researcher concluded the Gen X's experience in the workplace, the role of mentorship, and executive coaching in female leaders were methods to help with career advancement.

Lee's (2019) quantitative study supported the literature on gender by linking the representation of women on governing boards and the hiring of female CEOs at 340 human service organizations with a gross receipt of \$10 million dollars or more in revenue. According to Lee, the independent variables were whether women accounted for one-third and half of the board of directors and whether women consisted of a majority of the board of directors. The researcher stated dependent variables were the representation of women on the board related to the gender of the CEO at the organization. The findings from Lee's study indicated larger organizations were less likely to have a female CEO, and the business revenue was positively associated with the likelihood of choosing one. Lee's study suggested the likelihood of having a female CEO did not vary according to government grants received, organizational age, religious affiliation, or geographic location. The researcher attested it was important for non-profits to

consider the diversity factor when developing their board as it lead to improved financial performance and responsiveness to stakeholders.

Cook (2019) took an activist approach and investigated the correlation between black girl leadership organizations and black female leaders in the non-profit sector. Cook's study included participants with two to 27 years of experience in the non-profit sector who served as a CEO, a founder, managerial executive, or a departmental director. Cook suggested not enough black girls participated in leadership development programs that helped them become effective leaders. The researcher claimed there were mixed results regarding if there was a disconnect between the mission of black girl leadership and the difficulty of finding employment as a black female leader. Cook noted more activism research was needed to help build awareness about the diversity in the non-profit workforce.

Shields and Cassada's (2016) case study examined gender, race, and ethnicity of non-traditional leadership development programs. The participants in the study included 337 leaders serving in non-profit and for-profit schools in Richmond, Virginia. The findings from the study indicated there was lack of diversity in the number of women representing leadership roles and there were insufficient leadership and development programs at the school. Shields and Cassada indicated for school leaders to effectively serve diverse and at-risk students, an increase in demand for training beyond university education was necessary.

Several researchers expanded the body of knowledge by explaining in certain instances, non-profit boards failed to consider diversity when identifying candidates for executive leadership positions (Cook, 2019; Flippen, 2017; Lee, 2019; Shields & Cassada, 2016). The researchers indicated a gap still existed between the number of females being represented in both managerial positions and leadership development and professional programs at large

organizations (Cook, 2019; Flippen, 2017; Lee, 2019; Shields & Cassada, 2016). The researchers demonstrated that non-profit boards were experiencing challenges during the selection process for executive leadership positions (Cook, 2019; Flippen, 2017; Lee, 2019; Shields & Cassada, 2016). Lee's (2019) study indicated that no matter which gender was appointed, the non-profit boards' concern was if the organization was performing financially. All four studies related to the topic for this study because it provided insight into implications that existed within the leadership pipeline and helped to answer the first research question, what are the factors used by faith-based organizations to select executive leaders (Cook, 2019; Flippen, 2017; Lee, 2019; Shields & Cassada, 2016). In Ohio's faith-based organizations, there were similar concerns when appointing a new executive. The decision makers expressed that the individual needed to bring in new members rather than be the reason why people were leaving the organization. Additionally, during the executive leadership selection process, the search committee was encouraged to diversify the leadership pool.

Executive Leadership Selection Summary

The executive leadership selection section highlights the career path and characteristics, and competencies of former executive leaders. A sizeable number of studies explored executive leadership selection from the perspective of young professionals, internal candidates, newcomers from the for-profit and government sectors, and former non-profit executive leaders (Bish & Becker, 2019; Cook, 2019; Davis & Myers, 2018; Desrosiers et al., 2018; Flippen, 2017; Hunter & Decker-Pierce, 2021; Kuenzi & Stewart, 2017; Lee, 2019; Nelson, 2019; Norris-Tirrell et al., 2018; Schlosser et al., 2017; Shields & Cassada, 2016; Stewart & Kuenzi, 2018). Additionally, the studies viewed leadership development and the differences between the selection of gender when it came to executive leadership positions (Cook, 2019; Flippen, 2017; Lee, 2019; Shields

& Cassada, 2016). The next section discusses the succession planning efforts within non-profit organizations.

Succession Planning Efforts Concept. LeCounte et al. (2017) approached succession planning for chief executive officers in for-profit and non-profit entities utilizing the human capital theory. According to the researchers, succession planning included: (a) the development of a leadership pipeline through talent management, (b) organizational career management, (c) choosing between internal and external hires, (d) and the executive's prior experience. The researchers attested top executives emphasized the importance of developing a CEO succession plan. They concluded comprehensive succession planning was developed with the input from board members and a collaboration between the current CEO, the board of directors, the firm, and stakeholders.

Cavanaugh (2017) provided an overview of succession planning for senior leaders in higher education institutions and the challenges associated with the process. Cavanaugh suggested organizations should prepare for succession planning in the case of emergency and when they could predict leadership transitions. He claimed predictable transitions incorporated professional leadership development programs for staff in the institution. Cavanaugh argued higher education institutions tended to hire outside of the organization because they wanted to seek the best talent available. The researcher noted institutions routinely rejected internal candidates that participated in leadership development programs because they felt the programs prepared them for work at other institutions. Cavanaugh concluded higher education institutions would best prepare for succession planning by making leadership development courses available to everyone, and organizations should create ways to capitalize on internal candidates.

Landry (2018) proposed a succession planning framework for directorship positions at cultural arts non-profit organizations in Montreal. The framework included three dimensions: (a) planning, (b) access mode to directorship, and (c) organizational changes. Landry highlighted the different forms of leadership succession and explained that the tool was not designed to provide only one solution. The researcher implied the tool was highly transferable in the for-profit and government sectors. Landry concluded that the non-profit board needed to understand the mission and the constraints of the organization.

Sechrest's (2020) narrative study provided solutions for non-profit organizations faced with unanticipated executive leadership turnover. Sechrest's personal experience as an interim executive leader and provided insights on what decision makers should look for when selecting an interim. Sechrest emphasized that various solutions are available for building an interim leadership period into a transition process. Sechrest concluded organizations should be aware that leadership transition was real, there would be risks involved, and there was the opportunity to search for an external candidate to fulfill the executive leadership role, if an internal candidate was not immediately available.

Succession Planning Efforts and Executive Leadership Transitions

Stewart's (2016) mixed methods study explored non-profit executive turnover at 40 non-profit organizations in the top twenty metropolitan statistical areas in the United States. The sample included current executives of organizations that experienced executive turnover, and the organizations ranged in size from \$100,000 to ten million in annual revenue (Stewart, 2016). Stewart's study centered around the organizational characteristics, personal characteristics, and the process characteristics of executive turnover events. Findings from Stewart's study indicated the majority of boards managed transition independently or consulted with the outgoing

executive, and all of the searches resulted in the selection of an external candidate. Stewart attested successors who replaced long-serving executives operated in their shadow, while successors appointed after a dismissal were micromanaged by the board. Stewart suggested the reasons for executive turnover were both involuntary and voluntary, and often staff resigned from the organization as a result of the turnover. Further, Stewart indicated an executive's selection was not the end of the turnover process because it required the successor to get acquainted with the non-profit, the board, staff, and stakeholders.

Stewart et al. (2020) used a paired survey approach consisting of a group of 94 organizational cases and their board members to explore executive leadership transitions and the outcomes. The researchers' work suggested there were residual effects in response to an executive's departure, including a loss of a major donor or institutional funder, positive media coverage, and involuntary resignations. The researchers stated when non-profit boards prepared and managed the transition, four months elapsed between the beginning of the search process and the start date of the incoming executive. Moreover, they claimed boards managed the transition on their own, retained a recruiter/search firm, hired an executive transition consultant, or acquired technical support from an affiliate organization to help replace executive leaders. The researchers indicated non-profit boards selected candidates based on the applicant's experience, qualifications, and performance in the application and interview process. Stewart et al. claimed non-profit boards managing transition sought after growth, stability, and turnaround as the outcome of the turnover event.

Succession Planning Efforts and Faith-Based Organizations

There were minimum studies conducted on faith-based organizations and succession planning for executive leadership positions. The peer-reviewed journal articles focused on the

religious organizations (i.e., churches) genre of secular faith-based organizations (Matshobane & Masango, 2020). Matshobane and Masango (2020) used a qualitative grounded theory approach for African Independent Pentecostal churches in South Africa preparing for leadership transitions. The findings in the study indicated pre-succession planning challenges consisted of no succession plan or oversight structure. In contrast, post-successions challenges consisted of sudden changes, resistance from the congregation, and factions. Matshobane and Masango concluded by proposing a pastoral succession model by Osmer to analyze the problem and find the practical solutions for the challenges presented.

Pratt et al. (2018) performed a qualitative grounded theory approach to explore the experience of church ministers who were appointed as transitional leaders shortly after ministerial departure in one Christian denomination in New Zealand. The researchers compared the study's findings with the Interim Ministry Network (IMN) guide to address transitional leadership in a church setting. The researchers stated the common themes associated with a crisis and ministerial departure included: (a) loss of direction, (b) conflict, and (c) organization dysfunction. The researchers indicated three goals the transitional leader worked to successfully implement change within the organization, included (a) resolution of conflict, (b) restoration of congregational well-being, and (c) appointment of a permanent leader. According to the researchers, transformational leadership was applicable to transitional ministry because it focused on change and inspiration. The researchers called for further research into issues leading to change, managing conflict, and the well-being of churches and other types of organizations.

Barton's (2019) ethnographic study explored succession planning and Christian higher education at Lipscomb University, a faith-based institution in Nashville, Tennessee, using Richard's (2009) 5C framework. The researcher focused on the Connect and Bridges program,

which included a group of 24 faculty and staff members as part of a year-long study (Barton, 2019). Barton found nine themes in the study, which included: (a) developing future leader was a clear priority of the President; (b) historical and religious cultural norms were influential in the decision making; (c) the purpose of the two programs at the university was clearly understood by participants; (d) participants exposed to other leaders was highly valuable; (e) participants valued for the opportunity to be included in the program; (f) there were intentional and ongoing efforts by the President to connect with the wider Nashville community; (g) there was a lack of clarity for what participants followed as opposed to what was presented; (h) the board prioritized succession planning efforts; (i) participants from the program indicated they were aware what the program was designed for. Barton concluded intentional succession planning was needed for Christian higher educational institutions by examining a long-term view of the leadership pipeline, including an inventory of the current roles and leadership gap.

Succession Planning Efforts and International Non-Profit Organizations

The United States has been the primary location for authors conducting studies on succession planning for non-profits; however, researchers have discussed the topic of succession planning for non-profit organizations worldwide (Besel & Pico, 2018; Khan, 2020; Li, 2018; Santora, 2019; Varhegyi & Jepsen, 2017). Varhegyi and Jepsen (2017) conducted a quantitative study on the attitudes towards the succession planning process of directors of non-profit organizations in Australia. The sample included directors from 17 registered clubs, which included 65 male and 18 female respondents. The researchers used the Succession Planning Scale (SPS), the Succession Planning Target Scale (SPTS) and the 15-item Quick Check as instruments for the study. Findings from the study revealed that non-profit boards perceived themselves as more effective when they are engaged in the succession planning process.

Moreover, directors should be involved in succession planning for the CEO position because they were familiar with the process. Other findings showed succession planning was a multi-dimensional process and the CEO should assess the director's attitude towards the succession planning process as part of an organizational practice. Varhegyi and Jepsen concluded succession planning helped organizations ensure the quality and quantity of candidates for director positions.

Using the Carmichael mentoring method, Collins's (2019) case study explored mentoring programs run by small-non-profit organizations in Ireland. In Collins's study, participants included 74 mentees and 24 mentors that consisted of executives, paid staff, and board members. According to Collins, the mentees signed up for the program because they needed more support from their board, wanted more influence, had staffing issues, and desired to speak with someone unrelated to the non-profit organization. Collins's study suggested the challenges for mentees meant allocating time and energy for the program, being critiqued, and trying out new ways of thinking. Collins emphasized the benefits of the mentoring program was participants could understand the challenges of the NGO sector and be given the opportunity to participate in leadership development programs. Collins concluded that both the individuals and the organization benefited from the program because it enabled non-profit chief executives and managers to develop the skills, insights, competence, and confidence needed to support leadership development skills.

Khan (2020) investigated leadership development initiatives of mid- to large non-profit organizations in the Kingdom of Saudi Arabia. According to Khan, there was an increase in the number of higher education opportunities and a rise in organizational professions. Khan's study found a correlation between the level of professionalization, fundraising plan, and support of the

local community. Additionally, there was a negative correlation between the number of employees and the level of professionalization. Khan suggested more research should be conducted on ethical and religious norms related to decision-making for leadership development and training programs.

Li's (2018) fuzzy-set qualitative comparative analysis explored post succession performance for 15 non-governmental organizations (NGOs) in China. Li used the organizational life cycle, resource dependence, institutional theories, and the organizational fit literature to develop a theoretical framework for the study. Findings from the study showed in an unfavorable political environment, if the founder had less control over the organization, the NGO was less professionalized. Moreover, if the successor responded to the environment with an active strategic orientation, the NGO would achieve good post succession performance. The second finding revealed in favorable political environment, when the NGO had less control, is professionalized, and the successor adopts an active strategic orientation, the organization will perform well after succession. Additionally, in a favorable political environment, NGOs with less founder's control, has a functional board, and a professional organization structure was likely to achieve good post succession performance. The researcher concluded founders having less control was linked to high performance after leadership succession, and when an active executive was missing, boards needed to be more supportive.

Besel and Pico's (2017) qualitative ethnographic study explored executive succession planning strategies for Cuban NGOs. Although Besel and Pico mentioned the topic of succession planning, they did not speak about executive leadership in a traditional form. Rather, Besel and Pico focused on what future leaders needed to do as part of historic preservation efforts in

Havana, Cuba. Besel and Pico concluded by emphasizing Cuban NGOs should partner with European countries and US-based businesses.

Santora et al. (2019) raised the level of awareness and the need for succession plans in the international community, specifically Estonian non-profit organizations. The researcher conducted a qualitative narrative study from 15 executives of Estonia non-profit organizations. The researchers stated decision makers felt executive succession planning and the transition was time-consuming, they were not actively seeking successors, and the need to replace their leaders was not urgent. They indicated organizational policies consisted of former executives mentoring the successor to ensure a smooth transition. The researchers claimed non-profit boards preferred internal employees to external candidates in a two-to-one margin because decision makers wanted to maintain the status quo. Additionally, the researchers elaborated on characteristics, experience, knowledge, risk and trust, and the outcome of the succession planning process. They concluded by stating the executive succession process had both positive (i.e., new ideas, high motivation levels, good managerial style) and negative outcomes (i.e., limitation of resources, personality change, difficulties with external stakeholders).

Succession Planning Efforts Summary

Matshobane and Masango's (2020) study was related to this study because gave the perspective of succession planning from the perspective of non-profit boards at religious faith-based organizations. Similarly, Barton's (2019) study gave the perspective of succession planning from participants working at secular faith-based organizations. Barton (2019) supported Matshobane and Masango's (2020) study by indicating historical and religious norms were influential in the decision-making of participants. Both studies provide insight into external

influences that may contribute to the success or failure to implement succession planning (Barton, 2019; Matshobane & Masango, 2020).

Findings from several studies were related to this topic because they provided a holistic view of succession planning from a global perspective and have similar outcomes as the studies conducted within the United States (Besel & Pico, 2017; Khan, 2020; Li, 2018; Santora et al., 2019; Varhegyi & Jepsen, 2017). Moreover, the studies provided insight into the complexity of leadership development and succession planning within the non-profit sector worldwide (Besel & Pico, 2017; Khan, 2020; Li, 2018; Santora et al., 2019; Varhegyi & Jepsen, 2017). The five studies included the viewpoint from non-profit boards, staff, and executive leadership helped to better understand the key challenges and methods non-profit organizations were using to implement succession planning (Besel & Pico, 2017; Khan, 2020; Li, 2018; Santora et al., 2019; Varhegyi & Jepsen, 2017). The five studies were helpful for answering research questions number two and three (Besel & Pico, 2017; Khan, 2020; Li, 2018; Santora et al., 2019; Varhegyi & Jepsen, 2017).

Theories

Situational Leadership Theory. The situational leadership theory provided the foundation for this study's purpose and the problem the researcher sought to explore. The situational leadership theory is a contingency model where the leader's behavior is adjusted according to the situation (Hersey & Blanchard, 1993). Hersey and Blanchard (1993) theorized leadership styles were based on four quadrants: (a) directing-telling, (b) coaching-selling, (c) supporting-participating, and (d) delegating. The follower's willingness and readiness are measured through their ability to independently complete tasks, but as a team effort. The

leadership style used by the leader will empower the follower to grow as exceptional individuals when completing their work.

As part of this study, the situational leadership theory helped answer research questions two and three. The second research question was (a) what are the factors that contribute to the successful implementation of succession planning efforts within faith-based organizations. The third research question was (b) what are the factors that contribute to the failure to implement succession planning. Hersey and Blanchard (1993) argued that leadership styles are flexible, and no one leadership style was better than the other. The first quadrant in the situational leadership model is directing-telling, in which the follower was at the lowest level of readiness and is unwilling and unable to perform the task. The leader gave the follower specific instructions about the goals while closely monitoring their performance. The second quadrant in the situational leadership model is coaching-selling, in which the follower was at a moderate level of readiness and was unable and unwilling to complete the task. The leader sets all the goals, but consulted with the follower. The third quadrant in the situational model is supporting-participating, in which the follower is at a high level of readiness, is able, but unwilling to complete the task. The leader assumes the follower is knowledgeable, but is insecure at times. The fourth quadrant in the situational leadership model is delegating, in which the follower is at a high level of readiness, willing to complete the task, and the leader only offers assistance when needed. As such, a significant portion of this literature review focused on the research surrounding the topic of succession planning and leadership development and the leadership styles that exist in non-profit organizations. Exploring the situational leadership theory contributed to the current study because the literature on leadership style provided insight into the issues or factors that contributed to the success or failure to implement succession planning.

The findings of this study revealed that the facilitator actions and behaviors revealed that the individual used all four leadership styles when conducting succession planning activities for executive leadership positions.

Situational Leadership Theory and Leadership Development

Henkel and Bourdeau (2018) conducted a field study to explore the situational leadership behavior styles used by military managers enrolled in an advanced management leadership program. According to Henkel and Bourdeau, the managers consisted of 620 first-line supervisors and middle managers who are active duty, reservists, and National Guard across the U.S. and internationally with experience leading teams. The findings from Henkel and Bourdeau's study revealed military managers had two predominant leadership styles, which were selling and participating. The researchers did not find any other leadership styles used by military managers. Henkel and Bourdeau concluded the situational leadership theory provided a practical approach and assisted managers with understanding and applying leadership styles.

Zigarami and Roberts's (2017) quantitative study used the situational leadership model consisting of 573 participants working for international consulting and leadership development companies worldwide. The researchers used five different instruments as part of the framework from the study, which included (a) The leadership action profile (LAP), (b) the leadership behavior description questionnaire form, (c) the positive and negative affected scale (PANAS), (d) the affective scale, and (e) cognitive trust scale. Findings from the study revealed employees received (a) high direction or low support, (b) high direction or high support, and (c) low direction or high support from their managers. Additional findings revealed managers most frequently use low directive and low supportive leadership styles. Additionally, Zigarami and Roberts suggested the employees had less preference for task or directive behaviors and

preferred a charismatic leader. The researchers indicated nine out of ten followers reported there was a fit between their manager's situational leadership style and their needed leadership style. Zigarami and Roberts concluded when employees perceived needed leadership styles from their manager; they increased their performance levels as opposed to employees who did not receive their desired leadership style from their manager.

Situational Leadership Theory and Non-Profit Organizations

No recent studies from the years 2016 to 2021 were conducted by scholars and practitioners who utilized the situational leadership approach pertaining to the leadership style of management within non-profit organizations. As of this study, the researcher was able to obtain one study within the past ten years that described the situational leadership theory in a non-profit context. Mehta (2012) supported the literature on situational leadership theory by exploring leadership effectiveness for 105 managers of 35 NGOs from various sectors within India. The findings showed 70% of the managers primary leadership style was selling, and their secondary leadership style was participating. None of the participants had delegating as their primary leadership style, but a small fraction had delegating as their secondary leadership style. Another finding showed there was a correlation between selling and participating styles of leadership and the highest categories included personal effectiveness, secretive, effective people, insensitive, and ineffective. Moreover, only two percent of managers had high effectiveness and ability to assess the subordinate's maturity levels. Mehta concluded there was a wide range of leadership styles that were necessary for leadership effectiveness; however, there is still room for improvement in terms of the leader assessing the readiness of the follower.

Situational Leadership Theory as a Contingency Model

Negro and Mesia's (2020) study used four contingency models to assess the IBM corporation, which included (a) situational leadership theory, (b) Fidler's contingency model, (c) the leadership shamrock model, and (d) path-goal leadership model. The researchers used the situational leadership model to determine the different patterns of behavior or leadership traits that were useful in certain situations. According to Negro and Mesia, the findings suggested managers placed in various situations develop better leadership skills and become more versatile because the leader learned by reflecting and determining the best course of action when leading the follower. Negro and Mesia indicated when leaders were not put in situations that cause them to adapt, they could not manage unpredictable changes that occurred in the workplaces.

Tortorella and Fogliatto (2017) applied the situational leadership theory and the implementation lean for automobile parts manufacturing companies in Brazil to determine the primary and secondary leadership styles used by management at each hierarchy level. Tortorella and Fogliatto's case study used Hersey and Blanchard's (1996) LEAD Questionnaire instrument and conducted semi-structured interviews that included 18 team leaders, nine group leaders, three assistant managers, and one general manager from the same manufacturing unit. The findings from Tortorella and Fogliatto's study indicated team leaders' primary leadership style was directing, and their secondary leadership style was coaching. The primary leadership style for group leaders was supporting, and the secondary leadership style was coaching. The assistant managers' primary leadership style was coaching, and their secondary style was directing. For general managers, supporting was the primary leadership style and delegating was the secondary leadership style. Tortorella and Fogliatto concluded by proposing a new approach to identify the

relationships between leadership styles and the various hierarchy levels of management when implementing lean continuous improvement practices.

Bhasin (2019) assessed the effectiveness of the situational leadership framework to assess the leadership style of 39 Area Service Managers (ASMs) in India from March 2019 to April 2019. The researcher used the standardized psychometric questionnaire and the situational leadership theory for the study. The findings revealed out of the 39 ASMs, six used the delegating leadership style, 11 used the participating leadership style, 16 used the selling leadership style, and six used the telling leadership style. Bhasin supported Hersey and Blanchard's model, indicating the theory worked for his study. Bhasin suggested the selling style was the preferred leadership style and leaders would complete their work on time if they sold their ideas to their followers.

Perna's (2018) qualitative study used the situational leadership model to explore the high demand context of Quick Service Restaurants (QSR's) to understand how managers guided their employees. Data collection consisted of semi-structured interviews from ten managers (i.e., assistant to general manager) ages 19 to 43. The findings showed two themes: (a) educational leadership, and (b) teamwork and that situational leadership is linked to educational leadership when the manager uses both a high task/low relationship and high task/low relationship leadership styles. Additionally, succession planning is linked to teamwork when the manager uses a high relationship/high task and the high relationship/low task leadership styles. Perna concluded the situational leadership model was useful in understanding the communication pattern of leaders.

Bosse et al. (2017) presented a computational model-based design of leadership support for the situational leadership theory based on a continuum of readiness. The researchers created a

simulation to test leadership styles used in various situations. The four stages included: (a) unable and unwilling, (b) unable but willing, (c) able but willing, and (d) able and unwilling. The researchers claimed the model focused on the behavior of a group because it made it possible to predict effectiveness. The researchers concluded more work was needed on the computation model; however, the testing validated supported leadership styles based on Hersey and Blanchard's situational leadership theory.

Afshari et al. (2017) added to the situational leadership literature by using the situational leadership model to compare the leadership styles and biographical characteristics of managers at Zabol University of Medical Sciences. In a descriptive-casual and comparative methodology, data was collected from 300 individuals (124 females and 176 males). The findings suggested there was no significant difference between the leadership styles of males and females; however, there were differences between the educational levels of leaders. Other findings revealed managers that obtained master's degrees or higher used the participative (i.e., supporting-participating) or delegating styles, whereby bachelor's degree holders used the persuasive (i.e., coaching-selling) style more than the others. Moreover, there was a significant difference between the manager's leadership styles and their years of work experience. Other findings revealed that managers with one to ten years of work experience used the directive (i.e., directing – telling) and persuasive style (i.e., coaching-selling) more than others and managers with 20 years or more used the participative (i.e., supporting – participating) and delegating styles more than the others. Moreover, there was a significant difference between the manager's leadership style and those who graduated as management majors. The researchers claimed managers who had degrees in business management used the participative and delegating leadership styles, whereas graduates in other fields used directive and persuasive styles more than others.

Lynch et al. (2018) added to the literature by proposing the personal-centered situational leadership theory (PCSL) to gain an understanding of how residents perceived leadership in residential care facilities for older people in the Republic of Ireland. The researchers used narratives, focus groups, and reflective notes for the study to capture a description of the experience, the issues that arose, the feelings about the experience, and lessons learned from the experience. The researchers introduced a new construct to McCormack and McCance's (2006, 2010) person-centered (PCN) framework to demonstrate the relationship between the leader and follower. The findings revealed the engagement process was fundamental to the development of being person-centeredness. The researchers concluded it was important for the leader and follower to work together to create a person-centered culture.

Criticisms of the Situational Leadership Theory

There were opposing views in the situational leadership literature pertaining to Hersey and Blanchard's (1993) situational leadership theory and the effectiveness of the model (Thompson & Glaso, 2018). Thompson and Glaso used the situational leadership theory to examine a leader's and the follower's degree of agreement for 168 supervisors and 830 employees from for-profit business organizations in Norway. The instrument used in Thompson and Glaso's study was Hersey and Blanchard's (1996) the lead questionnaire. The objective of the study was to evaluate the leadership style and the congruency between leader rating and follower self-rating of competence and commitment. Thompson and Glaso concluded that Hershey and Blanchard's situational leadership theory did not support the study's findings of congruency between leader rating and follower-self rating of competency and commitment.

Zaccaro et al. (2018) explored the work of researchers using situational leadership models to examine the behavioral aspects of the theory. The findings from the study revealed

situational leadership models needed a more holistic approach to integrating the person and the situation. Other findings suggested that researchers tended to treat the leader and the situational characteristics as statistically independent when both (i.e., the leader and the situation) should influence each other in different ways. Moreover, previous studies should include an objective and subjective approach and focused on the leadership style rather than the situational characteristics. They concluded by suggesting future research should be conducted on the behavioral aspects of the situational leadership theory.

Constructs

Potential Successful Implementation. Sawhill and Williamson (2001) defined non-profit success as the ability to accomplish mission objectives based on measurable goals that are simple, marketable, and easy to communicate with others in the organization. Sawhill and Williamson (2001) claimed success was divided into three broad areas: (a) impact, (b) activity, and (c) capacity. The determinants of non-profit organization success in the peer-reviewed articles focused on scholars researching executive transitions and the management practices used to implement change successfully within an organization (Stewart & Twumasi, 2020). Moreover, researchers offered a framework for strategies, tools, and techniques that contributed towards the potential success of processes or procedures (Martinie et al., 2019).

Stewart and Twumasi (2020) explored the work of boards representing non-profit associations to understand how board members perceived their role by applying different theories to understand the non-profit boards behaviors and decisions. Findings from Stewart and Twumasi's study revealed there was no theory that fits into a single interview; however, the principle-agent theory was the most common paradigm used by board members. The second most common paradigm used by board members was the stewardship theory, which depicted a

collaborative approach among the board members and the outgoing and incoming executives.

The last common paradigm used by board members was the stakeholder theory, which their role within the organization. Stewart and Twumasi concluded non-profit boards maintained a principal role but were cognizant of the collaborative experience.

Sherrer and Rezania (2016) added to the literature by exploring the use and effectiveness of leadership coaching and the succession planning process at non-profit and for-profit organizations from the perspective of human resource professionals. The researchers used the Joanna Briggs Institute three-step strategy to map leadership coaching use and effectiveness by the number of articles. The findings indicated four out of 22 articles revealed leadership coaching as being effective. There were 20 qualitative articles, four quantitative articles, and two mixed methods studies that were descriptive in nature and none of the articles included were meta-analyses, systematic reviews, correlational research, semi-experimental, or experimental. Sherrer and Razania stated participants identified leadership coaching was used within succession planning processes and was effective, but more studies will need to be conducted on the topic for better generalizability.

Martinie et al. (2019) presented a learning framework that included four foundations worldwide that aimed to make changes within the organization about the various topics of interest, including succession planning. According to the researchers, each foundation was assigned a lead staff member to work as part of a cohort team to design a process together for a term of one year. The researchers implied the team produced effective ways to understand the context behind their decisions and developed a model to successfully implement change within their existing communities. The researchers concluded to obtain sustainability that participants needed to keep building relationships with others in the non-profit sector.

Successful Non-Profit Educational Programs

Rooney and Burlingame's (2020) case study explored the role of leadership and succession planning through a historical depiction of 15 different universities within the Non-profit Academic Centers Council (NACC), specializing in non-profit and philanthropic studies. According to Rooney and Burlingame, universities have taught students the technical skills needed to have a successful career within the non-profit sector. Findings from Rooney and Burlingame's study showed there was an increase in the number of faculty, programs, enrollments, research, and training programs offered at universities. Rooney and Burlingame concluded programs had a better survival rate if they had diverse revenue streams, were not reliant on one donor, allocated funds for leadership transitions and succession plans, endowments, and built advisory boards.

Kuenzi et al.'s (2020) study consisted of alumni from three schools in the southeastern and midwestern states that had graduate degrees in non-profit studies. The researchers aimed to identify graduate students' motivation for pursuing the degree. Findings from the study indicated the students' rationale for pursuing a graduate degree in philanthropic studies was based on its perceived value and future opportunities and growth within the non-profit sector. They concluded the appropriateness of a graduate degree in non-profit studies yield considerations from sector selection and commitment.

Stewart et al. (2021) discovered the relationship between competencies and skills and satisfaction with the school attended. According to Stewart et al., respondents were white females, the average age of 39, without children in the first group. However, in the second group, there was a diverse mix of participants. The researchers found a correlation between an alumni's satisfaction with degree career skills, interpersonal skills, management skills, and

communication skills. They concluded non-profit organizational decision makers preferred graduate degrees for professional positions and the skills developed in the programs and satisfaction rates were based on a school's reputation.

Walk et al.'s (2021) study consisted of 153 alumni from non-profit education programs to investigate an individuals' level of commitment within the non-profit sector, their education, and if participants viewed their work as a calling. The instrument used for the study was a five-point Likert scale survey and the researchers performed a multivariate and bivariate analysis to differentiate an individual's level of commitment within the sector. The researchers found alumni who were fully committed to the sector had extrinsic work expectations, perceived work as a calling, and maintained employment at non-profit organizations. They concluded that non-profit education helped cultivate sector commitment among alumni graduate students.

Rooney and Burlingame's (2020) study were relevant to the topic of succession planning for executive leadership positions because it highlighted the role educational institutions played in helping build the leadership pipeline at non-profit organizations. Several studies expanded the literature by including the perception of future candidates and explaining how obtaining degrees in non-profit studies creates value when attending reputable schools (Kuenzi et al., 2020; Stewart et al., 2021). Walk et al.'s (2021) study using non-profit graduate alumni showed that education may be necessary in the future when organizations need to identify qualified candidates' sector-wide. The researchers noted the participant's explanation on whether non-profit education provided insight about employees' commitment within in the sector. All four studies linked to the topic of succession planning due to the participant's accounts of getting non-profit related degrees to help them advance within their career (Kuenzi et al., 2020; Rooney & Burlingame, 2020; Stewart et al., 2021; Walk et al., 2021). For example, the findings from the study revealed

that individuals were attending university affiliated schools were eligible for executive leadership positions within the faith-based organizations. As executive leaders continued to work and retire within the non-profit sector, organizations were challenged with transferring knowledge through education and training programs for leadership development (Stewart et al., 2021). The subject of transferring knowledge through education and training programs for leadership development helped answer research question two, what factors contribute to the successful implementation of succession planning efforts for executive leadership positions at faith-based organizations (Kuenzi et al., 2020; Rooney & Burlingame, 2020; Stewart et al., 2021; Walk et al., 2021).

Successful In-house Training Programs

Murty et al. (2016) focused on the leadership development curriculum designed for two non-profit organizations that specialized in senior living facilities. The researchers stated both organizations used existing leaders to develop and teach leadership development programs, making them cost-effective. The findings from the study indicated successful talent management strategies increased the chances of survival in a changing and challenging environment. Moreover, organizations that reported employees who went through the programs maximized their growth opportunities placed before them. They concluded leadership development programs helped participants and the leader who developed and sustained them.

Lee and Suh's (2018) study examined executives from the health and human services non-profit organizations to understand their participation in the (a) managerial development and training programs, and (b) the financial management accountability policies. Findings from the study revealed the executives' participation in managerial development programs was positively associated with the organizational adoption of financial, client-service, and performance

evaluation. Other findings revealed various training and development program have varying impacts on accountability practices, emphasized that regular mentoring was important for executives. Lee and Suh concluded participation in general management and administrative training was as important as recruiting qualified individuals in ensuring accountability and performance.

Several studies highlighted the effectiveness of leadership development programs when they were properly executed within non-profit organizations (Lee & Suh, 2018; Murty et al., 2016). The researchers focused on leadership development from the executive leader's viewpoint, which implied that non-profit boards are sponsoring leadership development programs for internal employees that are successfully working for participants (Lee & Suh, 2018; Murty et al., 2016). Both studies were helpful for answering research question two, what factors contribute to the successful implementation of succession planning efforts for executive leadership positions at faith-based organizations (Lee & Suh, 2018; Murty et al., 2016).

Successful Leadership Development and Internship Programs

Scholars were exploring the career trajectories of non-profit graduate alumni and their pathway to executive leadership positions (Hoy-Gerlach et al., 2019; Leonard et al., 2016). In a case study approach, Leonard et al. (2016) explored the form of unpaid, temporary work performed by non-profit graduate alumni employed at WasteFoodie, a non-profit organization in the United Kingdom. The researchers interviewed managers, trustees, paid staff, and interns for the case study. Findings from the study indicated graduate students who volunteered for unpaid internships at non-profit organizations were able to increase their leadership skills, thereby becoming more valuable to the non-profit sector. However, the researchers demonstrated that hiring graduates for temporary positions did not come without risk. As the graduates obtained

more knowledge, skills, and abilities, they became more marketable to different charitable organizations, which brought risk to the non-profit organization losing a valuable employee once the temporary assignment was over. The researchers concluded by emphasizing the need for more studies about leadership opportunities for young professionals within the non-profit sector.

Hoy-Gerlach et al. (2019) described leadership development for two distinct internship placements of social workers (advanced graduate students) at the Toledo Human Society to help them gain leadership development skills. According to the researchers, non-traditional work placements served as learning opportunities for interns to build effective leadership skills. Findings revealed the feedback from program participants was positive, and the non-profit organizations created an innovative leadership development program for graduate students. They concluded by indicating practical skills and competencies were developed even when the student's degree was unrelated to the non-profit organization's mission.

Several researchers demonstrated that non-profit boards were exploring the benefits of hiring new graduates for key positions, whereas before, it was optional for executive leadership selection (Hoy-Gerlach et al., 2019; Leonard et al., 2016). Both studies revealed that non-profit boards were using different strategies to help build their existing leadership pipeline (Hoy-Gerlach et al., 2019; Leonard et al., 2016). Moreover, both researchers emphasized that leadership development opportunities are essential for internal promotions, which may provide a promising career in the future (Leonard et al., 2016, Hoy-Gerlach et al., 2019). From the perspective of paid staff and hiring managers, the researchers gave insight on non-traditional ways non-profit organization were building their leadership pipeline, which was helpful for answering research question two (Leonard et al., 2016; Hoy-Gerlach et al., 2019). The findings

from this study supported that non-profit boards were targeting new graduates and were using different strategies to recruit qualified candidates.

Potential Failure of Implementation. Mooney et al. (2017) defined succession failure as the boards' inability to ensure the development and selection of top leadership positions for the organization by means of opting to selecting an interim or temporary leader until the permanent one arrives. McKee and Froelich (2016) explored the barriers and substitutes for succession planning for executive leadership positions for cooperatives and non-profit organizations. According to McKee and Froelich, governance quality and forward planning enabled preparations for executive transitions to take place outside of the traditional method. Findings from the study revealed succession planning was positively related to developing and communicating career paths within the organization. Another finding showed that cooperatives, as opposed to non-profits, were more motivated by financial strategies when selecting a new chief executive. McKee and Froelich concluded that the barriers present in the non-profit organization partially explained the lack of succession planning in cooperative and non-profit organizations.

Stewart (2017) explored executive leadership turnover from the perspective of non-profit boards operating in the arts, human service, and health within the top 20 metropolitan statistical areas in the United States. Findings from the study indicated non-profit boards who lacked conversations about retirement with their aging executives felt remised or expressed relief when their executive announced their departure. Moreover, board members were highly dependent on the outgoing executive leader and were unsure about managing executive turnover events. Stewart concluded the outcome of turnover events varied according to the non-profit's size and capacity, transition climate, and the executive's taking charge process. Stewart's (2017) study

was relevant to the topic because the researcher highlighted the process board members used to navigate their roles when preparing for inevitable executive turnover events. Stewart's (2017) study helped answer the second research question, what factors contribute to the successful implementation of succession planning efforts for executive leadership positions at faith-based organizations.

Tebbe et al. (2017) explored the philanthropic investment towards formalizing approaches to succession planning, executive transitions management, and interim executive leadership. The researchers participated in the panel discussion about why the non-profit committee had not embraced succession planning. The findings from the researchers work indicated that there were a variety of reasons non-profit boards are hesitant about engaging in succession planning practices. They stated the underlying issues included (a) lack of awareness, (b) lack of urgency, (c) misunderstanding the challenge of succession and transition, (d) failure to call a time-out and hire an interim CEO, (e) lack of awareness about intentional interim executives, (f) tools are perceived too complex, and (g) unrealized norms. They concluded turnover for the chief executive role put time-bound and unique demands on the non-profit boards.

Unsuccessful In-house Training Programs

Shera and Bejan (2017) focused on the leadership and development of social workers serving in human service organizations in Toronto, Canada, by reviewing the Advanced Diploma and Specialization in Social Service Administration at the Factor-Inwentash Faculty of Social Work. Shera and Bejan stated the school were designed to help social workers obtain the knowledge, skills, and abilities to become leaders in the human services field who were ready to be promoted. Findings from the study showed students faced barriers consisting of (a) costs, (b)

culture, (c) work-life balance, (d) previous commitments, (e) competition from other programs, and (f) miscellaneous reasons. Another finding revealed the program received a positive response from previous participants, but decision makers had to close the program because there was not enough interest.

Vito's (2018) case study compared the various approaches to leadership development, organizational context, training outcome, and succession planning of two children's mental health agencies in Ontario, Canada. According to Vito, employers incorporated in-house training programs in hopes of helping potential candidates obtain the skills required for promotion. Findings from the study revealed employees complained that training was time-consuming and interrupted their responsibilities at work, causing more work-related stress. Trainees felt overwhelmed and stated the training caused an unhealthy work-life balance. Other workers found the training to be a rewarding experience and claimed it helped them flourish within the organization. Vito concluded by providing solutions for leadership development, and training programs suggested non-profit boards should develop comprehensive succession planning and prepare supervisors and managers for executive leadership positions.

Several studies were relevant to this study because they gave insight into leadership development in-house training programs and the non-profit organization's strategy to help build their leadership pipeline (Shera & Bejan, 2017; Vito, 2018). From the perspective of students, both studies explained the reasons non-profit organizations did not move forward with the leadership development programs designed for their employees (Shera & Bejan, 2017; Vito, 2018). Both studies highlighted that some of the limitations organization faced when attempting to manage the succession planning processes in the non-profit sector (Shera & Bejan, 2017; Vito, 2018). The findings from this study did not directly discuss the leadership development

opportunities provided for executive leaders within Ohio's faith-based organizations. However, both studies were helpful for answering research question three, what factors contribute to the failure of implementation of succession planning efforts for executive leadership positions at faith-based organizations (Shera & Bejan, 2017; Vito, 2018).

Related Studies

Researchers analyzed the employee's perceptions concerning the type of help they might need to implement succession planning programs and identifying future leaders (Norton & Linnell, 2016; Norton & Linnell, 2017). A study conducted by the New England Leadership examined the challenges non-profit boards and executive leaders faced at work (Norton & Linnell, 2016). The sample size included 877 leaders and 330 board members of non-profit organizations from all six New England states (Maine, New Hampshire, Vermont, Rhode Island, Massachusetts, and Connecticut) from Third Sector New England partners, foundations, and grantees. The findings from the study suggested the sector was on the verge of losing large numbers of leaders and non-profit organizations were still unprepared for executive leadership transitions. Additional findings revealed fundraising was challenging strained board and leader relationships. Norton and Linnell emphasized the non-profit sectors did not have sufficient funds to invest in leadership development programs which undermined the development of future leaders. The researchers concluded by making recommendations (i.e., building a succession planning framework) to help address the ways non-profit can overcome issues related to the challenges discussed within the non-profit sector. Norton and Linnell's (2016) study were relevant to the topic because it gave the perspective of partners, foundations, and grantees and their opinion on what the succession planning process should entail. Moreover, the information provided was helpful for answering research questions number two and three.

In a subsequent study, Norton and Linnell (2017) expanded their previous research on The Third Sector New England, by limiting the study to participants from the Greater Boston area. The researchers aimed to identify what the sector could do to prepare for its next leaders. The focus group conversations examined the leader's current succession planning and readiness for transitions, organizational structures, and leadership development for staff at all levels, and diversity and conclusion. Findings from the study identified three key challenges impacting the organization, which included (a) fundraising, (b) working capital, and (c) communication between boards and leaders. The researchers predicted 78% of leaders planned to resign from their organization through retirement or by moving to another sector and non-profit organizations were unclear as to their plans to replace leaders. Other findings from the study suggested there was no correlation between the age or tenure of current executive leaders and their intention to stay within the organization. The researchers claimed executives perceived their organizations as racially diverse at the staff level, whereas 40% of New England leaders reported they perceived their staff as not diverse. The researchers concluded that non-profit organizations needed to restructure the status quo operations to attract and retain truly diverse teams (Norton & Linnell, 2017).

Bell et al. (2017) study investigated executive leadership and transition and leadership development from years 2001 to 2014 to understand who leads community organizations and how community organizations were led. The findings suggested year 2001 had 64% of external hires for executive leadership positions, and year 2014 had 68% of external hires for executive leadership positions. The researchers claimed the non-profit sector lacked diversity demographically, politically, and culturally. According to the researchers, non-profit graduate education was problematic and had significant negative consequences for the next generation of

leaders. The researchers argued that current executives should be held accountable for nurturing and developing future leaders by engaging everyone in leadership opportunities within the organization. They suggested non-profit organizations who were unable to receive outside consulting due to budget constraints could receive the help they needed since there were numerous articles, books, guides, and practitioners written about executive leadership transitions. The researchers emphasized that the importance of executive leadership transitions and the need for changes within the non-profit sector to disrupt the social and political status quo. This study was relevant to the topic because it showed the hiring of external executive leaders remained stagnant, and more information was needed on the linkage between the selection process and implementation of succession planning.

The related studies explored the methods and procedures and types of errors made when attempting to adopt succession planning practices (Adams, 2017; Bui, 2019). Adams (2017) explored the practice of executive transition and the challenges associated with succession planning for executive leadership positions within the non-profit sector. The researchers reviewed 100 executive transitions to better understand (a) routine and non-routine transitions and (b) the non-profit boards approach during the executive search, organizational development, strategic planning. Adams's survey revealed 30% of organizations wrote succession plans that include unanticipated leadership absences and included policies boards used to help guide executive departures. Other findings from Adams's study showed well-managed transitions improved the performance of community-based development organizations and non-profits sector-wide. Moreover, executive leadership played a key role in determining organizational effectiveness by ensuring the successor would be a positive fit between the board of directors and the non-profit organization. Subsequently executive turnover increased costs but yielded

benefits if managed properly and the patterns associated with an organization's experience would either strengthen or weaken its performance and interfere with its effectiveness. Further, Adams suggested using outside support to assist the organization during executive transition yielded a higher number of successful transitions and successor tenure while helping reduce disruption associated with executive transitions. Adams concluded by stating practitioners should continually draw attention to the importance of succession planning and the risks associated with executive leadership transitions within the non-profit sector.

Biu (2019) conducted a survey to address the executive leadership selection process through the experiences of women of color working in the non-profit sector and the obstacles they faced to reach leadership positions. Bui's online survey included 4,385 respondents from individuals within the non-profit sector throughout the United States. The demographics of the respondents included 46% white women, 32% of women of color, nine percent of men of color, and ten percent of white men. Bui argued the sector needed to address the embedded biases and systematic barriers that make it harder for people of color to advance within their career despite being equally qualified as their white peers. Findings from Bui's study suggested racial, and gender biases created barriers for advancement. More findings revealed participants felt women of color were being passed over for new jobs and promotions, including men of color, white women, and white men with comparable or lower credentials. Moreover, the participants felt a candidates' credentials (i.e., education and training) were not enough to help women of color advance to senior leadership positions. Bui disclosed that women of color felt left out, ignored, or experienced scrutiny within non-profit organizations, which created conditions that undermined the leadership of women of color. The researcher concluded by calling for an act of change by encouraging non-profit organizations to address internal biases and create peer

support affinity groups for women of color. Biu's study was related to this topic because it gave the perspective of internal staff (women of color) and their beliefs on the executive leadership selection process. The perspective from different population groups was helpful for answering the first research question, what are the factors by which faith-based organizations to select executive leaders.

The Bridgespan group conducted a study of NGO's leadership development in India to explore the organization's efforts to strengthen their leader's skills sets and build their leadership pipeline (Venkatachalam & Berfond, 2017). The sample from Venkatachalam and Berfond's (2017) study included 250 leaders from Indian NGOs, International NGOs, funders, intermediaries, and executives. The findings from the study revealed leadership development were vital to the organization's success, yet practitioners and funders invested little time and resources towards leadership development. According to Venkatachalam and Berfond, Indian NGOs were incapable of recruiting, developing, and transitioning leaders. Venkatachalam and Berfond implied that in the past two years, fifty percent (50%) of NGOs had not received funding to develop leaders. They claimed 47% of NGOs felt confident internal employees could lead the organization in the absence of their senior leaders. The researchers concluded with four solutions to effectively develop leaders for Indian NGOs (Venkatachalam & Berfond, 2017).

In the for-profit sector, one article identified leadership styles and CEO successions (Kuntz et al., 2020). Kuntz et al. (2020) sequential explanatory mixed methods study explored whether CEO's discrepant leadership styles were reflected on CEO succession outcomes and the perception of employees post succession using the transformational leadership theory. The sample comprised of 230 employees (69% females and 75% males) at an Australian banking and insurance company. Data was collected from an online employee survey administered four times

over a three-year period and measured according to the Organizational Learning Capacity Scale and the Organizational Change Questionnaire. Study findings from the qualitative analysis revealed there was a discrepancy between the leadership style of the two CEO's and several employees; however, there were improvements in the learning culture following CEO succession. Other findings from the quantitative analysis showed there were improvement in leadership styles over time and significant increases in alignment scores occurred during the outgoing CEO's tenure. The researchers concluded organizational clarity surrounding the organization's processes and systems contributed to the employee's perception of the two CEOs. Kuntz et al.'s (2020) study was related to the topic because it highlighted the leadership style of executive leaders used during CEO successions which is essential for answering the first research question. Although Mehta's (2010) study was outdated, it provided information about how the theory was used within a non-profit context, which helped to answer all three research questions designed for this study.

Anticipated and Discovered Themes

There were four anticipated themes that emerged from the literature about the executive leadership selection and succession planning processes. The first theme in the literature was the former career path of non-profit executives would be considered as part of the selection process (Hunter & Decker-Pierce, 2021; Norris-Tirrell et al., 2018; Stewart & Kuenzi, 2018). The second theme was skillsets used by past executives are no longer applicable to future leaders (Hunter & Decker-Pierce, 2021; Rooney & Burlingame, 2021; Shera & Bejan, 2017; Stewart et al., 2021; Vito, 2018; Walk et al., 2021). The third theme was the way non-profit boards thought about executive leadership succession in the past would differ in the future (Barton, 2019; Cavanaugh, 2017; McKee & Froelich, 2016; Pratt et al., 2018; Stewart, 2016; Stewart, 2017; Stewart et al.,

2020; Varhegyi & Jepsen, 2017). The fourth theme was non-profit organizations experienced implications when deciding whether an internal or external candidate should be hired (Bruneel et al., 2020; Kuenzi & Stewart, 2017; Sherrer & Rezania, 2020; Varhegy & Jepsen, 2017).

There were five discovered themes that emerged from the findings of this study. Each theme helped to better understand the factors that lead to a successful or failure to implement succession planning efforts. These themes included: (1) importance of rotating leadership, (2) defining roles and responsibilities, (3) creating unity and momentum amongst the group, (4) documentation of standardized processes, and (5) staying mission-focused. The five emerging themes discovered from this study supported the findings from the academic literature are discussed in the following paragraphs. However, a more robust discussion on the linkage between the findings and the anticipated and discovered themes is located in Section 3.

Importance of rotating leadership. The first emerging theme titled, *the importance of rotating leadership*, supported the academic literature. Senior leader within Ohio's faith-based organizations noted that job rotations were necessary for executives to enhance their skillsets. Of the 18 participants, nine (50%) spoke about the importance of rotating leadership as their strategy to fill vacant leadership positions on a continuous basis. As Norris-Tirrell et al. (2018) confirmed, non-profit executives transferred to various non-profits with similar missions when they sought after promotions. Schlosser et al. (2017) discovered that executives with experience outside the nonprofit sector used their transferable skills to cross-over to various organizations. In alignment with the academic literature, the study participants revealed that executives within Ohio's faith-based organizations received promotions through job rotations. Additionally, job rotations expanded the executive leaders' knowledge, skills, and abilities required for the position.

Defining roles and responsibilities. The second emerging theme titled, *defining roles and responsibilities*, supported the academic literature. Senior leaders emphasized that the groups of individuals involved in the executive leadership selection and succession planning processes required defining clear roles and responsibilities to perform their work efficiently. Across both organizations, nine (50%) of the 18 participants emphasized that role clarity was essential for succession planning projects. The academic literature noted that without a set of clear roles and responsibilities for the various groups of individuals, succession planning efforts would continue to fail (Barton, 2019; Cavanaugh, 2017; McKee & Froelich, 2016; Pratt et al., 2018; Stewart, 2016; Stewart, 2017; Stewart et al., 2020; Varhegyi & Jepsen, 2017). Further, senior leaders conveyed that having the appropriate tools and guidance increased the team's level of confidence.

Creating unity and momentum amongst the group. The third emerging theme titled *creating unity and momentum amongst the group*, supported the academic literature. Eighteen (100%) of the participants expressed their feelings about conducting succession planning activities in an inclusive environment. For instance, incorporating prayer unified the groups of individuals working on succession planning projects because they shared a common purpose. In alignment with the academic literature, the historical, religious, and cultural norms within Ohio's faith-based organizations influenced the way various groups of individuals conducted succession planning activities for executive leadership positions (Barton, 2019; Li, 2018; Matshobane & Masango, 2020).

Documentation of standardized processes. The fourth emerging theme titled, *documentation of standardized processes*, supported the academic literature. Senior leaders revealed that documenting the process used for executive leadership selection and succession

planning helped guided the groups of individuals. In the academic literature, Adams (2017) suggested when non-profit leaders properly documented the steps required for succession planning projects, the likelihood of success was increased. Moreover, the senior leaders within Ohio's faith-based organizations emphasized that having the proper documentation made the process easier to navigate.

Staying mission-focused. Last, the fifth emerging theme titled, *staying-mission focused*, supported the academic literature. In support of the academic literature, Adams (2017) revealed when the number of risks and disruptions associated with succession planning activities were minimized, the likelihood of a successful outcome increased. Senior leaders revealed that focusing on the mission helped the team focused on preparing for leadership continuity. Further, by staying mission-focused, the team was able to complete the tasks assigned in a timely manner.

The Former Career Path of Executives and Selection Criteria

The researcher anticipated the former career path of executives may be considered as part of the selection criteria non-profit boards used to select an executive leader (Hunter & Decker-Pierce, 2021; Norris-Tirrell et al., 2018; Stewart & Kuenzi, 2018). However, the literature was categorized from a broad perspective based on the characteristics and competencies used by former leaders indicating board members need to consider which characteristics and competencies are applicable during the selection process of an executive leader (Hunter & Decker-Pierce, 2021; Norris-Tirrell et al., 2018; Stewart & Kuenzi, 2018). Moreover, the studies conducted were extended from the other sub-sectors of non-profit organizations outside of faith-based organizations (Hunter & Decker-Pierce, 2021; Norris-Tirrell et al., 2018; Stewart & Kuenzi, 2018). Further research was needed to address the selection process for executive

leaders within faith-based organizations to determine the characteristics and competencies used to select executive leaders.

Skillsets Used by Past Executives and Applicability to New Executives

The researcher anticipated the skillsets used by the outgoing executive would no longer be applicable to the incoming executive leader (Hunter & Decker-Pierce, 2021; Rooney & Burlingame, 2021; Shera & Bejan, 2017; Stewart et al., 2021; Vito, 2018; Walk et al., 2021). There were two perspectives within the context of the skillsets used by past executives that were applicable to new executive leaders. The first perspective was the academic literature focused on the demand side of leadership development programs, and the scholars called for a new set of skills for non-profit executives to be effective on the job (Hunter & Decker-Pierce, 2021; Norris-Tirrell et al., 2018; Stewart & Kuenzi, 2018). Hunter and Decker-Pierce (2021) reported executives retiring within the next ten years had outdated leadership skills, and boards were not funding leadership development programs. Shera and Bejan (2017) and Vito (2018) reported in-house leadership development programs were established by non-profit organizations to help with promotions and selecting candidates for leadership positions.

The second perspective from the scholars centered around the types of candidates who best fit the role of the executive leader. Rooney and Burlingame (2020) argued there was an increase in the number of participants enrolled at university programs and research conducted exclusively on the non-profit sector. Moreover, several researchers focused on graduate student alumni and their credentials gained from attending reputable schools (Stewart et al., 2021; Walk et al., 2021). Leonard et al. (2016) demonstrated non-profit organizations were taking on more risk by hiring non-profit graduate alumni to take on leadership positions. As of this study, the researcher did not indicate if an individual's educational credentials contributed to their success.

Differences Between Executive Leadership Succession and Non-Profit Boards

The researcher anticipated that the way non-profit boards thought about executive leadership succession in the past would differ in the future. There was a dispute in the non-profit sector about which party (i.e., current executive leader, non-profit board, and HR) should initiate the succession planning process (Barton, 2019; McKee & Froelich, 2016; Pratt et al., 2018; Stewart, 2016; Stewart, 2017; Stewart et al., 2020; Varhegyi & Jepsen, 2017). While research in the field has not been extensive, scholars believe that the non-profit board should manage the process independently, and that the chief executive should be involved in the succession planning discussions (Barton, 2019; Cavanaugh, 2017; McKee & Froelich, 2016; Pratt et al., 2018; Stewart, 2016; Stewart, 2017; Stewart et al., 2020; Varhegyi & Jepsen, 2017).

Barton (2019) claimed effective succession planning efforts started with the organization's chief executive and senior leaders because they could identify which candidates were ready to be promoted. Stewart et al. (2020) added non-profit boards prepared for executive leadership transitions by holding discussions with the outgoing executive. They suggested the board was responsible for initiating the succession planning process, and the chief executive should partner with an external consultant to help coach them through the process (Stewart et al., 2020). Kuenzi and Stewart (2017) reported strategic planning should be a shared responsibility between the board and the executive leader. They claimed it was necessary to differentiate the roles amongst the executive leader, the board of directors, and the other staff because the executive leader was linked to the performance of the organization (Kuenzi & Stewart, 2017). Sherrer and Rezania (2020) stated leadership coaching and succession planning could be used together, but not enough research has been conducted on the topic of leadership coaching and its effectiveness in a company's succession planning process.

There were criticisms regarding the non-profit board initiating the succession planning process. Varhegyi and Jepsen (2017) argued that boards did not have the expertise, time, or resources to conduct the succession planning process and suggested HR should initiate the succession planning process because it was part of the strategic plan. Bruneel et al. (2020) added non-profit boards had a variety of skill sets, experience, and were familiar with the organization's mission. Walk et al. (2021) concluded that volunteers without previous succession planning experience lacked confidence or knowledge about the organization's policies and procedures. They suggested non-profit boards should receive training to help them prepare for their roles (Walk et al., 2021).

The Decision to Hire an Internal or External Candidate

The scholarly literature implied that the succession planning process was important for ensuring the correct strategy was in place for identifying prospects (LeCounte et al., 2017, McKee & Froelich, 2016; Santora et al., 2019; Stewart, 2017). Scholars debated whether non-profit organizations should consider hiring internal or external candidates who qualified for executive leadership positions (LeCounte et al., 2017; McKee & Froelich, 2016; Santora et al., 2019). For instance, several studies indicated non-profit boards preferred hiring external candidates because they brought new knowledge and fresh ideas to the organization (Li, 2018; Stewart, 2017). McKee and Froelich (2016) had a neutral stance, indicating non-profit organizations preferred equally qualified candidates when conducting an external search.

Another on-going debate amongst scholars centered around the criticisms of hiring external candidates as opposed to appointing internal candidates for executive leadership positions (LeCounte et al., 2017; Santora, et al., 2019). For instance, Santora et al. (2019) concluded non-profit boards preferred hiring internal candidates over external candidates

because of trust, experience, knowledge, and maintaining the status quo. Alternatively, LeCounte et al. (2017) stated when recruiting an outside candidate, it was safer to consider a current leader of another organization instead of a pool of talent not currently employed as a leader. The researchers claimed hiring internal candidates encompassed of navigating through organizational politics, and decision makers would have knowledge of an internal applicant's past performance (LeCounte et al., 2017). As of this study, the literature did not address preferences for faith-based non-profit boards regarding the selection of internal or external candidates.

Summary of the Literature Review

An exhaustive search was conducted to find articles related to executive leadership selection and succession planning for executive leadership positions within non-profit organizations. The researcher explored 60 prominent peer-reviewed journal articles, professional association articles, and scholarly books relevant to the topic. Using a thematic approach, the articles were summarized and synthesized until no new knowledge was obtained about executive selection and succession planning efforts within non-profit organizations. The search for scholarly literature in relation to this case study was conducted within Liberty University's Jerry Falwell Online Library. The databases used to seek scholarly peer-reviewed journal articles in reference to the topic of executive leadership selection and succession planning consisted of ABI/Inform Collection, EBSCO, ProQuest, Sage Journals, Wiley Online Library. Outside of the online library, the researcher used the online platform Google Scholar and Candid to help identify professional articles related to the topic. Google Scholar is an online database that provides information on where to find scholarly literature (i.e., technical reports, conferences presentations, and journal articles) across various disciplines (scholar.google.org, n.d.). Candid is

a non-profit database that houses data about philanthropy and the non-profit sector at large (Candidate.org, n.d.).

The literature review discussed a decision makers' (i.e., executive leadership, the board of directors, human resources, and candidates) experience with the succession planning process. Additionally, the literature review addressed the linkage between leadership style used during the succession planning process and the potential outcomes of success or failure to implement. Since leadership development tied directly into succession planning, the researcher explored both processes to understand the current operating conditions within non-profit organizations from years 2016 to 2021. For this qualitative study, Hersey and Blanchard's (1993) situational leadership theory was used as a guide to understand the linkage between a decision makers' leadership style, the process, and the potential outcomes. The literature revealed the important themes associated with executive leadership selection and succession planning for executive leadership positions. While the body of academic and professional literature was robust, this study provided significant insight into the concepts, executive leadership selection, and succession planning efforts, which helped answered the research questions for this study. Moreover, the literature review provided a holistic picture of the current body of knowledge supporting the purpose of this study. Further, the literature revealed there was a significant need to explore the lack of succession planning within non-profit organizations and the inability to identify a future leader (Ballaro & Polk, 2017; McKee & Froelich, 2016; Stewart et al., 2020).

Summary of Section 1 and Transition

The general problem addressed was the potential lack of succession planning, resulting in the inability to identify future leaders within non-profit organizations. The specific problem addressed was the potential lack of succession planning, resulting in the inability to identify

future leaders within faith-based organizations within the state of Ohio. The research questions guiding the study were:

RQ1. What are the factors used by faith-based organizations to select executive leaders?

RQ2. What factors contribute to the successful implementation of succession planning efforts for executive leadership positions at faith-based organizations?

RQ3. What factors contribute to the failure of succession planning efforts for executive leadership positions at faith-based organizations?

The purpose of this study was to explore the reasons behind the lack of succession planning and the inability to identify future leaders in the non-profit sector. Moreover, a qualitative multiple-case study was an appropriate methodology for this study because it allowed the researcher to interact with participants (Maxwell, 2005). The study focused on the events that happen during leadership transitions, from the timeframe of the executive leader's departure to the new leader's arrival (Yin, 2018).

Further, this study explored the executive leadership selection and succession planning processes to understand the reasons that contributed to the potential success or failure to implement succession planning. This study was influenced by Lincoln and Guba's (2013) constructivist and influenced by an interpretive approach. The conceptual framework was designed to understand the events that occurred during the identification of a future leader and succession planning events (Heneman et al., 2019; Kramer & Nayak, 2013). The departure of an executive leader opened a job vacancy, which caused the organization to start the identification process for a successor (Heneman et al., 2019). The decision maker's level of effort influenced the outcome of the potential success or failure to implement the succession planning activity (Miller, 2018). Hersey and Blanchard's (1993) situational leadership theory were used as part of

the conceptual framework. The situational leadership theory stated that leaders had the flexibility to adjust their leadership styles in accordance with the needs of their followers, and that no leadership style was better than the other (Hersey & Blanchard, 1993).

This study benefited the field of business and the non-profit management and leadership cognate by sharing the lessons learned from organization decision makers' when selecting executive leaders (Word & Sowa, 2017). Moreover, the researcher anticipated that this study would help build awareness about the importance of organizational continuity and leadership development within faith-based organizations (McKee & Froelich, 2016). The significance of this study was the researcher explored the process and procedures used to select executive leaders, succession planning efforts, and the outcomes of potential success or failure (Miller, 2018).

In Section 2, the researcher discusses the types of participants who were eligible to participate in the study (Yin, 2018). Additionally, the researcher explains the role of the researcher when conducting qualitative multiple-case studies (Yin, 2018). Moreover, the research methodology, participants, population, and sampling appropriate for qualitative multiple-case studies is discussed (Yin, 2018). Subsequently, in the data collection and analysis section, the research explains the data collection and instruments used for this study (Creswell & Poth, 2018). Further, the researcher discusses the reliability and validity of this study (Creswell & Poth, 2018).

Section 2: The Project

As discussed in Section 1, this qualitative multiple-case study was to explore executive leadership selection and succession planning processes within faith-based organizations. Section 2, The Project, was built upon Section 1 and reflects how the researcher planned to conduct the study using a qualitative multiple-case study approach. In a purposeful sampling approach, the researcher conducted 18 semi-structured interviews with senior leaders from Ohio's faith-based organizations. The senior leaders were former or current employees and volunteers from the eastern and western region of Ohio. The senior leaders had previously conducted succession planning activities for executive leadership positions. Section 2 begins with the researcher restating the purpose of the study, as disclosed in Section 1. This is followed by discussions on the role of the researcher, the research methodology, participants, population and sampling, data collection and organization, data analysis, and the reliability and validity of the study. Section 2 concludes with a summary and transition to Section 3. Additionally, the researcher provides a summary of the research proposal.

Purpose Statement

The purpose of this flexible design multiple-case study was to add to the body of knowledge by exploring the reasons for the potential lack of succession planning, resulting the inability to identify future leaders in the non-profit sector. The researcher sought to understand the factors by which faith-based organizations selected executive leaders. Additionally, this study explored the factors that contributed to the potential success or failure to implement succession planning. The larger problem of the potential lack of succession planning was explored through an in-depth study of the inability to identify future leaders in faith-based organizations in Ohio. While scholars have conducted studies related to the strategies used by

individuals to advance their career to an executive leadership position, little was known about the process and procedures non-profit organizations used to identify future leaders (Nelson, 2020; Norris-Tirrell et al., 2018; Santora et al., 2019). Non-profit organizations were experiencing a gap in the existing leadership pipelines due to an increase in the number of executive leaders eligible for retirement, while there was no ample supply of qualified professionals to fill those vacancies (Hunter & Decker-Pierce, 2021; Stewart et al., 2020). Understanding the perspectives of decision makers involved in the succession planning process for executive leadership positions at faith-based organizations helped the researcher gain insight into the potential success or failure to identify future leaders.

Role of the Researcher

Creswell and Poth (2018) stated the researcher is the key instrument of a qualitative study. The researcher followed all requirements and protocols given to obtain approval from Liberty University and Ohio's faith-based organizations. Prior to recruiting participants, the researcher obtained approval from Liberty University's Institutional Review Board (IRB) to conduct the study. Additionally, the researcher included the instruments (see Appendix section) that were used as part of this study. After permission was granted by IRB, the researcher contacted the gatekeepers (i.e., those in authority positions) at each site where the researcher recruited participants and conducted the study (Singh & Wassenaar, 2016). Prior to the recruitment of participants and data collection, the researcher emailed gatekeepers to obtain permission to conduct the study at their site. The email included a copy of the approval letter from IRB, a consent form, and the instruments used for the study (Singh & Wassenaar, 2016).

After permission was granted by the gatekeeper (i.e., the pastor), the researcher collected data from multiple sources of information that included interviews, documents, and archival

records (Creswell & Poth, 2018). Through a purposeful sampling approach, the researcher identified the participants selected for interviews for the study (Creswell & Poth, 2018). Using the instruments approved for the study, the researcher asked the participants 11 semi-structured questions to gain their perception on the executive leadership selection and succession planning processes (Yin, 2018). The purpose of asking open-ended questions was to allow participants to talk freely about their experiences regarding succession planning for executive leadership positions within Ohio's faith-based organizations (Yin, 2018). Creswell and Poth (2018) recommended that qualitative researchers collect data in the participant's natural setting or the field site where the participants experienced the issue or problem. The researcher conducted 18 one-on-one interviews using Microsoft Teams, a virtual conferencing platform, where the participants communicated with the researcher from their workplace.

Participants selected for this study remained anonymous and were eligible to withdraw from the study at any time without further recourse (Simon & Goes, 2018). The researcher was obligated to protect the privacy and confidentiality of participants in the study and any names or personal information were replaced with codes (Yin, 2018). For the interviews, the researcher designed the instrument, (an interview guide), containing 11 open-ended questions for participants to answer on a one-on-one basis. For the document collection, the researcher collected documents and archival records that were available to the public from Ohio's faith-based organizations dedicated website. Due to the Covid-19 pandemic, the researcher was unable to assess documents related to succession planning for executive leadership positions at the site. Therefore, in the initial email, the researcher asked participants to share any documents related to the executive leadership selection and succession planning processes. After data collection, the researcher used NVivo, a qualitative software that assisted the researcher with understanding the

participant's experience with succession planning within Ohio's faith-based organizations. The researcher conducted a series of steps that included transcribing the data collected from the interview responses, analyzing the data, and reporting the reliability and validity of the study.

Bracketing was used to reduce or exclude the researcher's personal experience with the phenomenon (Creswell & Poth, 2018). During the bracketing process, the researcher removed various assumptions and biases from the study (Moustakas, 1994). In data analysis, bracketing assisted the researcher with setting aside all preconceived experiences and understand the experiences of participants in the study (Creswell & Poth, 2018). To help minimize bias, the researcher disclosed all preconceive experiences about the values and experiences brought to this qualitative multiple-case study so that the reader could understand the researcher's position. The researcher was careful not to unintentionally influence the study by interjecting their own biases based on the participant's responses to the interview questions. For instance, case study research biases are commonly found in interviews with poorly articulated questions, response bias, inaccuracies due to poor recall, and reflexivity (Yin, 2018).

Creswell and Poth (2018) emphasized professional and educational experiences presented biases that influenced the researcher's interpretations. For this study, the researcher holds a master's degree in business administration (MBA) and is employed as an executive director at a non-profit organization under the genre of youth services. The researcher had no direct experience regarding succession planning for executive leadership positions within the non-profit sector. However, the researcher was a previous board member of a non-profit preschool program and participated in the hiring and termination of employees from various non-managerial hierarchical levels and positions. By establishing protocols to collect data consisting of

interviews, documents, and archival records, the researcher was able to identify and report the findings from this study in a fair manner (Creswell & Poth, 2018).

Research Methodology

Qualitative research methods are flexible designs that require human interaction between the researcher and the subjects being studied to obtain a better understanding of the phenomenon (Creswell & Poth, 2018). For the purpose of this study, little was known about the process of selecting executive leaders and succession planning efforts at faith-based organizations (Nelson, 2020; Norris-Tirrell et al., 2018; Santora et al., 2019). Yin (2018) stated qualitative studies helped researchers understand how a group of people view an event. This study required an in-depth understanding of the perceptions and experiences of individuals within faith-based organizations to better understand the inability to identify a future leader (Yin, 2018). Yin stated case studies are designed to answer the “how” and “what” questions when investigating phenomenon within a real-world context. As such, the concept of this multiple-case study was two-fold. First, this study was designed to explore ‘what factors by which faith-based organizations select executive leaders’. Second, this study was designed to explore ‘what factors contribute to the success or failure to implement succession planning’. The case study method allowed the researcher to use multiple sources of information (i.e., interviews, documents, and archival records) to better understand the phenomenon (Yin, 2018). Moreover, a flexible design enhanced the study by allowing the researcher to make the necessary adjustments during its course (Robson & McCartan, 2016). The following section provides a discussion of the flexible design, case study method, and method of triangulation.

Discussion of Flexible Design

This study was conducted with a flexible design using a qualitative multiple-case study method (Yin, 2018). The reason for a flexible design was to explore the reasons behind the potential lack of succession planning, resulting in the inability to identify future leaders in the non-profit sector. A qualitative research method was chosen for this study because it allowed the participants to share their experiences regarding the succession planning process within a non-profit setting (Creswell & Poth, 2018). A phenomenological design may have been an appropriate design for this study; however, a case study was selected because it focused on a specific time period, rather than the participants lived experiences. (Yin, 2018). Additionally, a flexible approach allowed the researcher to view the participants' response to the problem, the context in which they responded, and the thoughts and behaviors that governed their response (Creswell & Poth, 2018).

Discussion of Case Study Method

This study employed a case study method because it explored an event that occurred to a group of people within a specific timeframe, which was the most appropriate for this investigation (Yin, 2018). Yin (2018) recommended case studies be bounded within the parameters of timeframe, place, and location. For this study, the timeframe explored was from the departure of the outgoing executive leader to the arrival of the incoming successor (Stewart, 2020). Yin (2018) stated the three types of case studies were (a) explanatory, (b) descriptive, and (c) exploratory. Lee et al. (2007) stated explanatory case studies tend to be preliminary studies that map out themes from the subsequent research. Additionally, the researchers mentioned that descriptive case studies expand the research on the trends already answered by survey research. Lee et al. stated that exploratory case studies seek to derive a detailed understanding of a

phenomenon and does not provide support for quantitative methods. Additionally, this study explored a decision makers' effort to implement succession planning and the outcomes (Hersey & Blanchard, 1993; Word & Sowa, 2017).

Case study researchers collected qualitative data from a variety of sources for use in both qualitative and quantitative studies (Eriksson & Kovalainen, 2016). Specifically, a qualitative multiple-case study was chosen for this study to explore the process of succession planning and the themes associated with specific outcomes (Yin, 2018). Multiple-case studies are single cases consisting of replicate studies (Yin, 2018). According to Eriksson and Kovalainen (2016), there is no single rule concerning the minimum number of cases that should be selected for any given multiple-case research project. However, Yin (2018) recommended limiting the number of cases of two to three to retain flexibility for the study. For this multiple-case study, the researcher used two cases.

Discussion of Method(s) for Triangulation

Robson and McCartan (2016) described triangulation as using multiple sources to enhance the rigor of the research. Case study researchers used personal and in-depth interviews as the primary research data, and secondary data (i.e., documents, archival records, and journals) were common methods used for triangulation (Eriksson & Kovalainen, 2016). Yin (2018) stated triangulation helped researchers collect data from multiple sources to establish credibility of the findings. For this qualitative multiple-case study, the researcher used data triangulation consisting of interviews, documents, and archival records to help answer the research questions (Eriksson & Kovalainen, 2016). Additional information on the triangulation process is located in the discussion of methods triangulation section.

Interviews are appropriate for case study research because it allows participants to talk about their experience with the phenomenon (i.e., succession planning for executive leadership positions within faith-based organizations) (Creswell & Poth, 2018). For this study, interviews were conducted with 18 participants who held employment, were currently employed, or volunteered for a faith-based organization. The researcher conducted semi-structured interviews and used a guide to serve as a checklist of the topics covered, but the wording and order changed according to the flow of the interview (Robson & McCartan, 2016). Moreover, the researcher added follow-up questions based on the participant's responses (Robson & McCartan, 2016). Additional information about the instruments (i.e., an interview guide) that were used for the interview process is depicted in the instruments section.

Documents and archival records were appropriate tools used for this case study because it allowed the researcher to develop an audit trail from data collection, provided supporting evidence, and enhanced the reliability of the study (Yin, 2018). Yin cautioned when reviewing documents and archival records, that researchers should be mindful the information provided because it may not always be accurate or current. Moreover, Yin indicated archival records were typically used for record-keeping purposes and produced for a specific purpose or audience. Nevertheless, archival records should be used in conjunction with other sources of information when producing a case study. Examples of archival records included: (a) public use files, (b) service records, (c) organizational records, (d) maps and charts, and (e) survey data (Lee et al., 2016). Additional information about interviews, documents, and archival records collected for this study is discussed in the instruments section.

Summary of Research Methodology

A multiple-case study method and a flexible research design was appropriate for this study because sought to understand succession planning events from a group of individuals within the non-profit sector (Creswell & Poth, 2018). This study explored the selection of executive leaders and the success or failure to implement succession planning efforts within faith-based organizations. A flexible design was appropriate for this study because it allowed the researcher to understand the participants experiences surrounding the executive leadership selection and succession planning processes within faith-based organizations. The case study method was appropriate for this study because it sought to explore a succession planning event within a specific timeframe. Moreover, triangulation helped establish credibility of the data provided and included multiple sources of information (Robson & McCartan, 2016). The researcher used primary data consisting of 18 one-on-one interviews with participants to understand their experience regarding executive leadership selection and succession planning efforts within faith-based organizations (Creswell & Poth, 2018). The researcher conducted 18 one-on-one interviews through Microsoft teams, a web-based virtual conferencing platform (Creswell & Poth, 2018; Moser & Korstjens, 2018).

Moreover, the researcher used secondary data consisting of documents and archival records available to the public as evidence to support the findings for this multiple-case study (Yin, 2018). The researcher assigned each participant a unique code to maintain the anonymity and confidentiality of the study participant (Creswell & Poth, 2018). The researcher ensured data collected as from the study (i.e., participant interviews, documents, and archival records) remained in a secure location (Creswell & Poth, 2018). After research approval, the data collected from the study was required to be kept for three years before being permanently deleted

(Yin, 2018). Additional information about the coding process is available in the coding themes section.

Participants

For this study, a qualitative multiple-case study design was selected to explore the process of executive leadership selection and succession planning within Ohio's faith-based organizations. The study participants ranged from community volunteers to paid, senior level staff executives. Participants were also recruited from the governing authority of the organization, which was the board of directors. The participants selected in this study had the authority or knowledge to offer useful information about the executive leadership selection and succession planning processes (Worth, 2019). The researcher included senior level executives of a faith-based organization because they could provide details and insights about their experiences towards the executive leadership selection and succession planning processes (Worth, 2019). Additionally, executive leaders were responsible for the management and operations of the faith-based organization. Participants for this study had the ability to provide in-depth information about the executive leadership selection process and the potential success or failure to implement succession planning efforts at faith-based organizations.

Characteristics of the study participants included leaders who held employment, were currently employed, or volunteered for an Ohio faith-based organization, and had participated in succession planning activities for executive leadership positions. The participants were selected based on their leadership roles and experience in the executive leadership selection and succession planning processes (Hersey & Blanchard, 1993). The researcher chose Ohio's faith-based organizations for this study because of their unique characteristics. Primarily, faith-based organizations were founded by religious groups, and operated differently than other non-profit

entities (Torry, 2016). For instance, there are faith-based organizations that center their decision-making around historical and religious cultural norms, and then there are institutions that take on a secular approach (Torry, 2016). A non-probability sampling frame was used to select participants representing the population of the study (Creswell & Poth, 2018). A purposeful sampling approach was used for this study because it allowed the researcher to select participants to be interviewed for the study (Creswell & Poth, 2018). Participants were provided a consent form (see Appendix C) to participate in the study, with the ability to withdraw from the study at any time with no recourse (Simon & Goes, 2018).

Population and Sampling

For this multiple-case study, the population included two faith-based organizations located in the eastern and western regions of Ohio. The researcher used a sample to represent the population of faith-based organizations operating in Ohio. Providing the entire population of faith-based organizations was undesirable due to the number of organizations within the non-profit sector. As of this study, there were 37,172 public charities in Ohio (Philanthropyohio.org, 2020). As Patten and Newhart (2017) explained, not all individuals would be provided the opportunity to participate in the study.

Identifying the target population ensured the right participants were selected for the study (Creswell & Poth, 2018). The researcher created a sample eligibility or criteria that listed the requirements to be used to select participants. The inclusion criteria include: (a) participants who were over the age of 18, (b) held employment, are currently employed, or volunteered for a faith-based organization, (c) had experience with participating in a search committee to replace the leader, and (d) held a leadership role at the faith-based organization. The criteria omitted demographic information concerning race and ethnicity, but included gender, age, and

educational background. The researcher presented the criteria to the pastor to help identify participants eligible to participate in the study. With the pastor's permission, the researcher emailed recruitment letters to 68 participants. The researcher complied with all the rules set forth by LU's Institutional Review Board including gaining access to participants, ensuring confidentiality, and maintaining data security.

Discussion of Population

The eligible population for this study was faith-based non-profit organizations located in Ohio. Non-profit organizations were identified as 501(c)(3) tax exempt organizations registered with the Internal Revenue Service (IRS) (Internal Revenue Service, 2018). As of this study, there were 37,172 public charities registered in the state of Ohio (Philanthropyohio.org., 2020). This number represented all the charitable organizations in Ohio and included a portion of religious organizations. According to the IRS and the Ohio Attorney General's office, not all religious organizations were required to register for tax exempt status (Charitable.ohio.gov, 2022). The population size was appropriate for this multiple-case study because it represented Ohio faith-based organizations that conducted succession planning for executive leadership positions. Therefore, minimizing the characteristics of the target population could influence the results of the study (Manchaiah et al., 2020). The sample size for this study was two faith-based organizations located in Ohio. The target population for this study included Ohio faith-based organizations and excluded organizations outside of the region.

Discussion of Sampling

Sampling is defined as a way of obtaining data from smaller groups within the population (Manchaiah et al., 2020). The researcher used a purposeful sampling method to collect the data because it allowed the researcher to choose the participants for the study (Creswell & Poth,

2018). A purposeful sampling method is used in qualitative studies and allowed researchers to make decisions about who or what should be sampled, the form the sampling conducted, and how many people or sites are needed to be sampled (Creswell & Poth, 2018). The researcher only had access to a sample of the population being represented in the study. The sample for this study included 18 participants who had experience with succession planning for executive leadership positions within faith-based organizations located in Ohio. Creswell and Poth (2018) stated qualitative research focused less on the size of the sample and more on obtaining in-depth information about the event or phenomenon. Researchers may sample at the site level, event or process levels, and the participant level (Creswell & Poth, 2018). The researcher used a purposeful sampling, a form of non-probability sampling, to select participants representing the population of the study. For multiple-case studies, Yin (2018) recommended that no more than two or three cases be used for replication. For this study, the researcher used two cases for replication.

Discussion of Sampling Method

This qualitative multiple-case study utilized a purposeful sampling method as a strategy to obtain knowledge from the participant's experience with the executive leadership selection and succession planning processes (Creswell & Poth, 2018). Purposeful sampling is a form of non-probability sampling where participants are specifically selected by the researcher (Stratton, 2021). Moreover, purposeful sampling methods were appropriate for qualitative case studies because researchers used their knowledge of the population to select the individuals who they believed will provide reliable sources of information (Patten & Newhart, 2017). The researcher's ability to gain access to information related to the executive leadership selection and succession planning processes was essential for understanding the research questions. Moreover, a

purposeful sampling method was appropriate for this study because not all faith-based organizations were willing to share information about their policies and procedures for research purposes. Therefore, the researcher selected two faith-based organizations that were willing to share information required for the study.

For this study, the sample included participants who had experience with succession planning for executive leadership positions within faith-based organizations. This qualitative multiple-case study sought to explore the lack of succession planning and the inability to identify future leaders within faith-based organizations. Creswell and Poth (2018) explained that sampling for qualitative research was conducted at the site level, event or process level, and the participant level. For this study, the researcher included samples from the process level, which consisted of participants who had experience leading succession planning activities within an Ohio faith-based organization (Creswell & Poth, 2018).

Discussion of Sampling Frame

A sampling frame consists of the group of individuals within the target population who could be chosen for a study (Patten & Newhart, 2017). Sampling frames helped researchers set boundaries for a study, represent the study's objectives, and included participants who have experienced the phenomenon (Creswell & Poth, 2018). For this study, not all faith-based organizations operating in the state of Ohio were given the opportunity to participate in the study, rather the 18 participants chosen were selected by the researcher. A purposeful, non-probability sampling method was appropriate for this study because it did not give all the individuals within the population an opportunity to participate in the study. Further, non-probability sampling was less difficult to perform because it involved an easier selection process (Patten & Newhart, 2017). Therefore, choosing leaders from other genres within the non-profit

sector might encounter coverage bias, and the information provided may not be unique to Ohio faith-based organizations (Manchaiah et al., 2020).

Discussion of Desired Sample and Sample Size

The sample used for this study was faith-based organizations located in the state of Ohio. The desired sample was appropriate for this study because the research topic focused on the potential lack of succession planning, resulting in the inability to identify future leaders within Ohio's faith-based organizations. The sample size used for this multiple-case study was two faith-based organizations located in Ohio. The sample size was appropriate for this study because no more than two or three cases were conducted, which did not affect the generalizability (Yin, 2018). For this multiple-case study, 18 individuals were selected for interviews and the study was concluded at data saturation (i.e., when no new information had been provided, or when the evidence became redundant within the study). Interviewing multiple study participants until recurring themes began to emerge helped the researcher obtain data saturation for the study (Baxter & Jack, 2008).

Robson and McCartan (2018) stated researchers were required to establish rapport with the site's gatekeeper to obtain permission to conduct the study. To obtain access to the sample used for this study, the researcher contacted the gatekeeper (i.e., pastor) through an email, or the phone number listed on Ohio's faith-based organizations dedicated (Creswell & Poth, 2018). After approval was granted from the pastor, the researcher collected personnel information that was publicly available from the organization's website (Creswell & Poth, 2018). Next the researcher emailed participants to invite them to the study (Creswell & Poth, 2018). The 18 participants selected for the study met the criteria developed, which included working or volunteering for an Ohio faith-based organization, holding a leadership position, and had

experience participating in succession planning activities for executive leadership positions (Yin, 2018).

Summary of Population and Sampling

The current study explored executive leadership selection and succession planning processes at Ohio's faith-based organizations. The participants chosen for the study were currently employed, held employment, or volunteer for an Ohio faith-based organization. The population of the study included senior leaders from the eastern and western regions of Ohio. A purposeful sampling method was used to collect the data because it gave the researcher the opportunity to select participants that were accessible to the study (Creswell & Poth, 2018). Participants for the study were interviewed until data saturation commenced. Data saturation occurred when no new information or knowledge was obtained by the researcher (Baxter & Jack, 2008). The researcher used a non-probability sampling frame to select participants representing the population of the study, which did not give all the individuals an opportunity to participate (Patten & Newhart, 2017). Further, this multiple-case study included no more than two cases that were used for replication. (Yin, 2018).

Data Collection & Organization

The researcher gathered information related to the research problem from Ohio's faith-based organizations and the participants. For this study, data was collected primarily through semi-structured interviews with participants from faith-based organizations located in Ohio. Secondary information collected for the study were documents and archival records. Moreover, the researcher used member checking (i.e., follow-up interviews) to validate the participant's responses or add new information that was not covered during the interview. The instruments

used to collect data for this study included (a) screening survey, (b) interview guide, (c) documents, and (d) archival records.

Subsequently, the researcher provided an overview of how the data was organized and gathered for the study. For this multiple-case study, the researcher created and maintained a spreadsheet for data collection. Participants' names were masked to protect their identity, and raw data was imported into NVivo, a qualitative software. The NVivo software assisted with coding and developing emerging themes in an efficient and effective manner. Additional information on the data organization process was located in the data organization plan section.

Data Collection Plan

The data collection process started by identifying the population of executive leaders at faith-based organizations. The researcher used the dedicated websites of the Catholic, Southern Baptist, and United Methodist Churches, three largest Christian denominations in the United States, to search for faith-based organizations located in the state of Ohio. To narrow the selection and find the appropriate organizations, the researcher clicked on vacant job postings advertised for senior level positions located in Ohio. On a Microsoft Excel spreadsheet, the researcher added the contact information of the faith-based organization recruiting for the position.

The data collection procedures required using instruments designed for the study, which included a screening survey and an interview guide (Eriksson & Kovalainen, 2016). Once the targeted list of participants was complete, the researcher emailed the contact person directly, followed by an introductory letter and a screening survey. Using the screening survey (see Appendix A), the researcher determined if the participants were eligible for the study. The researcher collected information about the role, tenure, and work or volunteer experience.

Additionally, the researcher collected demographic information about their education. If the participant met the criteria for the study, the researcher scheduled an interview based on the participant's availability. Using a set of questions from the interview guide (see Appendix B), the researcher collected information from the participant about their experiences through semi-structured interviews. Further, the researcher collected supporting documents and archival records from the study participants and the organization's website about the executive leadership selection and succession planning processes. Using the same Microsoft Excel file, the researcher generated a new tab to conduct data entry that included notes on where the information was obtained for the study. Additional information about the interview guide, documents, and archival records is located in the instrument section.

A multiple-case study method and a flexible research design was an appropriate method for this research project because it allowed the researcher to collect data from interviews, documents, and archival records for further analysis (Yin, 2018). Creswell and Poth (2018) stated the researcher is the primary instrument used to collect data for the study. A multiple-case study approach helped the researcher collect data about the executive leadership selection and succession planning processes from the perspective of an individual or a group (Yin, 2018). To collect data from the interviews, participants were asked 11 semi-structured questions about their experiences with executive leadership selection and succession planning processes (Husband, 2020). Moreover, qualitative studies allowed researchers to collect information from participants within their natural setting, which is where the issue or problem occurred (Creswell & Poth, 2018).

Member Checking. In qualitative research, member checking enabled participants to comment on whether they felt the information they provided about their experience was accurate

or whether they needed to make changes to their statement accordingly (Birt et al., 2016). Subsequently, member checking allowed the researcher to validate results and obtain further information from participants when necessary (Birt et al., 2016). After the interview, the researcher synthesized the interview questions and conducted the member checking process to enhance the reliability and validity of the study. The researcher transcribed the recorded interview for each participant to read and checked the accuracy of their statement. Further, the researcher left contact details with the participants in case they wanted to inquire more about the study. For instance, participants may contact the researcher to provide more details to corroborate their statement or tell the researcher they wish to withdraw from the study.

Follow-up Interviews. After forty-eight hours, the researcher conducted a follow-up interview with each participant to review the transcript and accuracy of their responses. During the follow-up interviews, the study participants were given the opportunity to answer additional questions they had about the study. The researcher requested the participant provide a verbal consent or send an email to verify the accuracy of the transcribed document. Additionally, the invitation for participants to view and verify the accuracy of their transcript helped with the validity and reliability of the findings. Other validation strategies consisted of the researcher taking detailed notes, recording interviews, and transcribing interviews in an accurate manner.

Instruments

Interview Guides. The primary method for collecting data for this qualitative multiple-case study was interviews. The researcher used an interview guide consisting of semi-structured questions to help better understand the executive leadership selection and succession planning processes within Ohio's faith-based organizations. The interview guide (see Appendix B) comprised of 11 questions. The researcher asked participants a series of open-ended questions to

collect data about their experiences regarding the process of selecting executive leaders and succession planning. The questions from the interview guide were built from knowledge obtained from the literature review of this study. The interview questions designed for this study were designed to help provide new information to the current body of knowledge (McGrath et al., 2019).

The first set of interview questions were warm-up questions designed to establish rapport with the participant and set the stage for the interview (McGrath et al., 2019). Participants were asked how they became involved with the faith-based organization and their participation in a search committee. The interview questions in part one of the interview guide explored the issues addressed in the first research question pertaining to the factors used by faith-based organizations to select executive leaders. Participants were asked how their organization recruited and identified candidates for executive leadership positions. After providing their answer, participants were asked two follow-up questions to determine the skills and competencies required for executive leadership positions and what the organization did to help candidates qualify for executive leadership positions.

The questions located in part two of the interview guide were designed to understand the second research question: What are the factors that contribute to the successful implementation of succession planning efforts at faith-based organizations? The second set of questions focused on the succession planning process and the leadership style of the group facilitator during succession planning activities. Participants were asked to describe the succession planning process at their organization. The researcher developed two probing questions that helped obtain more information from participants about the facilitator and group members when needed. The first follow-up question was about the decisions made within the group and the second follow-up

question were about the directions given to group members during succession planning activities. Both follow-up questions were designed to understand the leadership style the facilitator used during the succession planning event. In the last question, participants were asked to reflect on their positive experiences while participating in succession planning activities.

The questions in part three of the interview guide helped answer research question three: What factors contribute to the failure to implement succession planning efforts at faith-based organizations? The third set of questions focused on the succession planning process, the leadership style, and the implications that may exist within the process. Participants were asked to discuss the challenges the group experienced during the succession planning activity. The first follow-up question discussed how the facilitator helped the group to overcome the challenges associated with the succession planning process, and the second follow-up question discussed the ways the facilitator could have increased the support provided to the group. Both follow-up questions are designed to understand the leadership style used during the succession planning event and the outcomes that may contribute to the failure to implement succession planning. In the second question, participants were asked to recommend changes to the succession planning process at their organization. The end of the interview, the researcher closed by asking the participant to provide more information besides what was covered as part of the interview.

Surveys. Another instrument used for this study was a screening survey. The purpose of this instrument was to screen participants and determine their eligibility for the study. This qualitative multiple-case study used a purposeful sampling framework. Using Liberty University's Institutional Review Board (IRB) template as a guide, the researcher used the screening survey (see Appendix A), as a data collection instrument for participants to answer preliminary questions for the study. The screening survey ensured participants were leaders who

have held employment, are currently employed, or volunteered for an Ohio faith-based organization, and have participated in succession planning activities. Individuals volunteering to participate in the study were asked several “Yes” or “No” questions so the researcher could verify their eligibility to participate in the study. Moreover, the screening survey allowed the researcher to compare results across various demographic groups when organizing the data. The participants for the study ranged from community volunteers to paid, senior level staff executives. Participants were also recruited from the governing authority of the organization, which was the board of directors. The participants included leaders who are currently employed, held employment, or volunteered for an Ohio faith-based organization and had a role in the executive leadership selection and succession planning activities.

Archive Data. The researcher reviewed archival records that provided information about the executive leadership selection and succession planning process at the organization. This archival data included job descriptions, policy manuals, annual reports, and other documentation publicly available from the organization. Eriksson and Kovalainen (2016) stated obtaining public and private documents for qualitative studies helped researchers gather enough data for saturation. For instance, job descriptions provided information about the tasks, duties, and responsibilities of the executive leader. Further, policy manuals and reports may share insights about the organization’s future plans for building the new leadership teams.

Relying on one source of data (i.e., one-on-one interviews) was insufficient for developing an in-depth understanding of the executive leadership selection and succession planning process within faith-based organizations (Eriksson & Kovalainen, 2016). Moreover, the archival records provided enhanced the reliability and validity of the study and answer the three research questions:

RQ1. What factors are used by faith-based organizations to select executive leaders?

RQ2. What factors contribute to the successful implementation of succession planning efforts at faith-based organizations?

RQ3. What factors contribute to the failure to implement succession planning efforts for executive leadership positions at faith-based organizations?

Data Organization Plan

Prior to conducting interviews, the researcher created a unique code for the study participants. To organize the data, the researcher used Microsoft Excel to create a spreadsheet with tables listing the coded name, date of collection, type of information, and file location. Raw data collected for this study included interview recordings, transcription, archival records, and the researcher's notes. After the interview, the researcher transcribed the recorded interview content verbatim into a Microsoft Word document and stored it in a password-protected file. For this study, the researcher collected data in the form of interviews, documents, and archival records. Once the participants verified their transcript, the researcher organized the data using NVivo, a qualitative software. The NVivo software allowed the researcher to summarize the information and to identify themes present in the data. The researcher saved the archival records as pdf files and created an annotated bibliography to serve as an index, which facilitated the documents storage and retrieval. By developing an annotated bibliography, the researcher was able to easily locate documents when composing the report for the case studies.

The researcher treated data collected in numerical and narrative forms as evidence for the case study. Yin (2018) stated the creation of a case study database increased the reliability and validity of the research study. The purpose of the case study database was for the researcher to preserve the data collected in a retrievable form (Fusch et al., 2018). The data collected for a case

study should be in a separate and orderly compilation, whether it is an article, report, book, oral, or visual form (Parmentier-Cajaiba & Cajaiba-Santana, 2020). The researcher used computer-assisted tools like Microsoft Word and Excel files to arrange the data where others could inspect the entire database, apart from reading the case study report (Woods et al., 2016). Further, the database was organized in an orderly manner so that external readers could locate the data extracted for the findings, obtain evidence from the research questions to the findings, and trace the process forward and backwards (Hoorani et al., 2019).

Summary of Data Collection & Organization

For this qualitative multiple-case study, the researcher collected data to provide corroborating evidence (Creswell & Poth, 2018). The researcher used multiple and different sources (i.e., interviews, documents, and archival records) to shed light on the topic of succession planning for executive leadership positions at faith-based organizations (Eriksson & Kovalainen, 2018). The researcher used appropriate data collection methods to access information about executive leadership selection and succession planning events at faith-based organizations. To explore the problem, the researcher collected data from participants about their experiences with the phenomenon. The researcher organized the data efficiently and effectively by maintaining an organized system that was accessible for present and future use.

Data Analysis

The process of data analysis consisted of organizing and reading the information collected, coding the data into themes, interpreting the data, and presenting the data (Maher et al., 2018). For this study, the researcher coded and analyzed data using traditional methods like hand coding and software (Maher et al., 2018). In traditional coding, researchers color coded the information, the underlying themes, and the categories in the study (Maher et al., 2018). For this

study, the researcher incorporated hand coding and software by using Microsoft Word and Excel to highlight text comprising of the themes and patterns that were found in the study (Maher et al., 2018). Moreover, the researcher collected the initial data in a Microsoft Word document before importing it into the NVivo software that was used to assist with the analysis and coding.

Emergent Ideas

In the memoing process, researchers scanned the database to identify major themes and organized their ideas (Birks et al, 2008). Creswell and Poth (2018) suggested that researchers read the study participant's interview transcripts in their entirety several times before breaking them into parts. By scanning the documents, the researcher built a sense of the data as a whole without getting caught up with the details of coding (Maher et al., 2018). Similarly, the researcher reviewed field notes, interview transcriptions, and audio and visual images to identify themes from the study (Eriksson & Kovalainen, 2016). Additionally, the researcher wrote memos of emergent ideas either on the digital files or in an accompanying text file by asking what, why, when, how, and by whom questions (Birks et al., 2008). Moreover, the memoing process helped the researcher create a digital audit trail that could be retrieved and examined over time (Salmona & Kaczynski, 2016). Further, the researcher used memoing as a validation strategy for documenting processes and clarifying the researcher's understandings of the associated themes (Birks et al., 2008).

Coding Themes

In qualitative research, the process of coding involved making sense of the data collected from interviews, observations, and documents (Eriksson & Kovalainen, 2016). In the coding process, the researcher aggregated the data into small categories (i.e., themes) and assigned a label to the code (Maher et al., 2018). The data collected from interviews, documents, and

archival records were presented in raw form before importing into the NVivo software program. NVivo assisted the researcher with developing an effective coding process to develop a codebook (Woolf & Silver, 2017). When developing a matrix query within the software, the researcher displayed themes from multiple cases in a table format, which allowed the researcher to explore and compare themes among the different cases (Woolf & Silver, 2017). Additionally, NVivo auto-summarize the data used for analysis and showed the interrelationships among the datasets (Woolf & Silver, 2017). Moreover, NVivo helped the researcher establish reliable records and enhanced the credibility of the study (Woolf & Silver, 2017).

Interpretations

In the interpretation process, researchers tried to make sense of the data and to uncover the patterns, themes, and categories generated by analysis (Creswell & Poth, 2018). For qualitative research, interpretation involved abstracting out the codes and themes used to understand the meaning of the data (Jenkins et al., 2016). First, the researcher developed the codes, and then, formatted the themes into larger units of abstraction to make sense of the data based on hunches, insights, and intuition (Kalman et al., 2020). Then, the researcher linked interpretations to the research literature developed by others or personal views as contrasted with a social science construct or idea (Jenkins et al., 2016). Creswell and Poth (2018) suggested researchers guide the interpretation using the following questions: (a) what surprising research did you not expect to find, (b) what information is conceptually interesting or unusual to participants and audiences, and (c) what are the dominant interpretations and what are the alternate notions. Further, the researcher might obtain peer feedback on early data interpretations or from their audit trail and procedures (Creswell & Poth, 2018). The researcher used tables to represent the relationships among concepts or final reporting (Kalman et al., 2020).

Data Representation

The data representation process is the final phase where the researcher packages what was found in the text, tabular, or figure forms (Parmentier-Cajaiba & Cajaiba-Santana, 2020). Creswell and Poth (2018) recommended researchers begin the data representation process by revisiting the research questions and the available data and create a visual image of the data collected using tables or matrices to categorize the themes. For this study, the researcher created a table or matrix with cells containing text (not numbers), which were used to compare and cross-reference categories to help visualize ranges or data patterns (Jenkins et al., 2021). For multiple-case studies, Yin (2018) suggested when there are two or more cases, a researcher should use a cross-case synthesis as an analytic technique. For this study, the researcher created a table in Microsoft Word to display the similarities and differences among the cases (Kalman et al., 2020). With this approach, the external reader could learn from the case, apply to a population of cases, or transfer them to another similar context (Woods et al., 2016).

Similarly, Creswell and Poth (2018) suggested researchers used hierarchical tree diagrams showing different levels of abstraction, with boxes in the top tree representing the most abstract information and those at the bottom representing the least abstract themes. NVivo allowed the researcher to create hierarchical structures of related concepts (Woolf & Silver, 2017). To reduce the dataset, the researcher developed a log to specify the inclusion and exclusion criteria relevant to the study (Woolf & Silver, 2017). The table included no more than five or six manageable groups within rows or columns or multiple displays (Woolf & Silver, 2017). Next, the researcher notated the patterns and possible comparisons, revisited the accompanying text, and verified the conclusions against the raw data or data summaries (Jenkins et al., 2021). In the final section, the researcher presented generalizations about the case in terms

of the themes and discussed the comparisons and contradictions with the literature (Creswell & Poth, 2018).

Analysis for Triangulation

Qualitative researchers prepared qualitative data from multiple sources to help strengthen the validity of the case (Rose & Johnson, 2020). For this study, the researcher collected data from several sources (i.e., interviews, documents, and archival records) to prepare for analysis and triangulation. To align multiple perspectives on the executive leadership selection and succession planning efforts within faith-based organizations, the researcher streamlined the data collected for the case study. Creswell and Poth (2018) recommended that researchers triangulate the data against another, look for patterns of thought and behavior, and focus on key events that can be used to analyze the event.

The quantitative side of qualitative research involved highlighting materials introduced in the descriptive phase or findings through tables, diagrams, and figures (Fusch et al., 2018). The blending of qualitative and quantitative techniques allowed the researcher to uncover underlying information about executive leadership selection and succession planning events within faith-based organizations (Fusch et al., 2018). For instance, the researcher needed to use tables to capture descriptive statistics consisting of quantitative data that was important for analyzing the study. Furthermore, by incorporating descriptive statistics, the researcher sorted the data according to a participant's age, gender, or role within the organization (Woods et al., 2016). Additionally, interviews were organized into categorical themes that contained broad units of information aggregated to form a common idea (Husband, 2020). Using the raw data collected from multiple sources of information assisted the researcher with categorizing the information based on the themes and perspectives (Fusch et al., 2018).

Summary of Data Analysis

The researcher reviewed information about the executive leadership selection and succession planning process that supported the multiple-case study findings. The researcher used NVivo to assist with coding and analyzing the data collected from the interviews, documents, and archival records. After coding, the researcher analyzed the raw data collected from the interviews, documents, and archival records, which brought meaning to the text and provided clarity on the patterns that exist throughout the analysis of the phenomenon. Through the bracketing process, the researcher ensured their experiences with the phenomenon did not influence the study. Furthermore, the analysis for triangulation process ensured that the case study rendered the participant's perspective accurately (Rose & Johnson, 2020). The researcher used multiple sources to support or contradict the interpretation process.

Reliability and Validity

This section will discuss the reliability, validity, and bracketing techniques used for this multiple case study. Reliability and validity were used to display trustworthiness and authenticity of the study (Rose & Johnson, 2020). In the reliability section, the researcher discusses the credibility, transferability, dependability, and confirmability of the study. In the validity section, the researcher discusses the bracketing, triangulation, and saturation techniques used in the study. In the bracketing section, the researcher discusses the bracketing techniques used to address the biases of the study.

Reliability

Rose and Johnson (2020) noted the purpose of reliability was to minimize errors and biases in a study. As the researcher conducted the case study, the procedures were documented so that external viewers could, in principle, repeat the procedures and hopefully arrive at the

same results if followed correctly (Yin, 2018). Creswell and Poth (2018) stated researchers established credibility through the triangulation of data sources, methods, and investigators. Creswell and Poth also mentioned that credibility allowed researchers to feel confident about their observations, interpretations, and conclusions.

For this study, the researcher used multiple sources of evidence to support or contradict interpretation, which included using interviews, documents, and archival records. Transferability referred to the ability to use data in one study and apply it to other research studies (Salmona & Kaczynski, 2016). In this case, the researcher ensured that transparency of the study was allowed for replication by external viewers (Hoorani et al., 2019). To increase the reliability of this study, the researcher created the instrument (i.e., an interview guide) that ensured the consistency between the participant's accounts of executive leadership selection and succession planning efforts. Dependability referred to the auditing of the research study and ensured the accuracy of the findings and were supported by the data collected (Cope, 2014). Additionally, confirmability was part of the audit process and referred to the degree to which the findings of the study could be confirmed by other researchers (Cope, 2014). For this study, the researcher conducted the member checking process by following up with the participant to ensure the accuracy of their interview transcript. Moreover, each participant was allowed to ask questions about the study or provide additional information. Further, the researcher triangulated the data using multiple sources, whereby different methods and perspectives helped produce a comprehensive and diverse set of the findings.

Validity

The purpose of validity in qualitative research is for researchers to employ accepted strategies to document the accuracy of the study (Rose & Johnson, 2020). Bracketing,

triangulation, and saturation are three strategies the researcher used to increase the validity of the study (Tufford & Newman, 2010). The researcher used the bracketing process to bracket out their own personal experiences as much as possible so the participant's experiences of the phenomenon can transcend (Tufford & Newman, 2010). In the role of the researcher section, the researcher disclosed understandings of the biases, values, and experiences brought to this qualitative research study as a non-profit executive director and a volunteer for a faith-based organization.

Triangulation was another strategy used by the researcher to increase the validation of a study (Fusch et al., 2018). Triangulation ensured the researchers used multiple and different sources to provide corroborating evidence (Fusch et al., 2018). To increase the validity of the study, the researcher triangulated the data using interviews, documents, and archival records. Further, the disclosures provided for this study allowed the readers to gain a perspective of the researcher's approach. The researcher conducted member checking with participants, where they were invited to ask questions about the study. Additionally, participants were asked to review their transcript so they could judge the accuracy, credibility, and include additional information or clarify their statements. The researcher made every effort to reflect the participant's experience accurately.

Saturation was the third strategy the researcher used to enhance the validity of this qualitative study (Baxter & Jack, 2008). Saturation occurred when the researcher received no new information from participants, or the evidence became redundant within the study (Baxter & Jack, 2008). For this multiple-case study, the researcher conducted interviews with 18 participants at faith-based organizations from different regions until data saturation was reached. Sowerbutts and Burden (2019) posited that data saturation would be achieved after interviewing

15 participants. Hence, the saturation point for this flexible multiple-case study was achieved at twelve (12) participants. A more robust discussion about data saturation is located in Section 3.

Bracketing

As discussed in the previous section, the purpose of bracketing was for the researcher to bracket out their own personal experiences as much as possible so the participant's experiences of the phenomenon can transcend (Tufford & Newman, 2010). The researcher explained in the data collection and analysis section that they are an executive director at a non-profit organization and affiliated with a faith-based organization; thus, it is necessary for the researcher to bracket those experiences. The data collection for the study came from participants who held employment, were currently employed, or volunteered for a faith-based organization. For this study, the researcher engaged in bracketing before and throughout the data collection and analysis process. Dorfler and Stierand (2021) posited bracketing helped researchers to refrain from judgement and explicitly acknowledge any beliefs and values that would prompt judgement. Additionally, Dorfler and Stierand concluded bracketing takes place in two phases of the research process, the data collection and the analysis.

For this study, the researcher collected rigorous data from study participants through interviews, documents, and archival records. The researcher used categorical aggression to establish themes and patterns from the literature that is related to her personal experience. Janak (2018) recommended researchers create an outline that helped them engage in the bracketing process according to their (a) background, (b) perception of subject, (c) interpretation, (d) impact, (e) ethical/political issues, and (f) the unexpected outcome of the overall research study. As the researcher collected the data, they continued to bracket out their personal experiences with the phenomenon. The researcher referred to bracketing their personal experience and the

need to explore the potential lack of succession planning for non-profit organizations and the inability to identify future leaders, rather than obtain theoretical explanations. This study included the steps taken to draw data from the study, which included the statements, meanings, and themes showing how the researcher arrived at the findings. The researcher ended the study by describing the essence of the experience for the participants and the context in which they experienced succession planning for executive leadership positions. Janak (2018) concluded researchers should examine all preconceptions before concluding their analysis.

Summary of Reliability and Validity

The reliability and validity of a study helped establish the trustworthiness and authenticity of the study (Rose & Johnson, 2020). To establish credibility, transferability, dependability, and confirmability for the study, the researcher used multiple sources of evidence to support or contradict interpretation. Further, the process of bracketing, triangulation, and saturation techniques increased the validity of qualitative studies (Dorfler & Stierand, 2021; Fusch et al., 2018). To increase validity for this study, the researcher bracketed out their own personal experiences as much as possible, used multiple sources of evidence, and collected data until no new themes or information arose from the study (Creswell & Poth, 2018). Further, the researcher used several bracketing techniques by disclosing biases in the study that was needed for exploring the potential lack of succession planning and the inability to identify future leaders within faith-based organizations.

Summary of Section 2 and Transition

Section 2 described the following sections: (a) the purpose of the study, (b) the role of the researcher, (c) the research methodology, (d) participants, (e) population and sampling, (f) data collection and organization, (g) data analysis and, (h) reliability and validity of the study. For this

multiple-case study, the researcher was the primary instrument and collected data from multiple sources of information that included interviews, documents, and archival records. The participants selected for the study included leaders of a faith-based organization ranging from community volunteers to paid, senior level staff executives. Participants were also recruited from the governing authority of the organization, which was the board of directors. For this multiple-case study, the population included faith-based organizations located in two different regions of Ohio. The participants for the study were selected through a purposeful sampling approach.

Data was collected primarily through semi-structured interviews with participants from faith-based organizations located in Ohio. Secondary information collected for the study were documents and archival records. The researcher asked participants a series of semi-structured questions about their experiences with the executive leadership selection and succession planning processes within faith-based organizations. The researcher designed an interview guide (see Appendix B) to help with the study. Additionally, the researcher conducted interviews until saturation was reached, which was when no new information was obtained from the study. The data collected from the study was transcribed, coded, and entered into NVivo for data analysis. Further, to increase the reliability and validity of the study, the data was triangulated by using multiple sources of evidence (i.e., interviews, documents, and archival records to support or contradict interpretation.

Section 3 discusses the application to professional practice and provides an overview of the study. The researcher discusses the presentation of the findings and highlighted key conclusion drawn from the study. Additionally, the researcher makes recommendations for future studies and presented findings from a Christian worldview perspective. Further, the researcher highlights reflections drawn from conducting this multiple-case study.

Section 3: Application to Professional Practice and Implications for Change

In this completed study, the researcher explored succession planning for executive leadership positions within Ohio's faith-based organizations. This section is divided into five sections: (a) the overview of the study, (b) the presentation of the findings, (c) application to professional practice, (d) recommendation for future research, and (e) reflection. A summary of the problem, and the guiding research questions is highlighted in the overview of the study section. Data collected from 18 semi-structured interviews, documents, and archival records generated from five themes identified in study is the discussed in the presentation of the findings section. Five recommendations are suggested to improve the general business practice and the potential applications strategies are discussed in the application to professional practice section. Further, three recommendations are suggested to the extend the topic of succession planning for executive leadership positions are presented in the recommendations for future research section. Finally, a general discussion on the lessons learned about the topic of succession planning for executive leadership positions is addressed in the reflections section.

Overview of the Study

The researcher conducted this qualitative multiple-case study to explore the selection and succession planning efforts for executive leadership positions within Ohio's faith-based organizations. The general problem addressed was the lack of succession planning resulting in the inability to identify future leaders. The specific problem addressed was the lack of succession planning at faith-based organizations within the state of Ohio, resulting in the potential inability to identify future leaders. The three research questions guiding the study were:

RQ1. What are the factors used by faith-based organizations to select executive leaders?

RQ2. What factors contribute to the successful implementation of succession planning efforts for executive leadership positions at faith-based organizations?

RQ3. What factors contribute to the failure of succession planning efforts for executive leadership positions at faith-based organizations?

This study explored the processes used to select executive leaders and succession planning efforts for executive leadership positions within Ohio's faith-based organizations. Hersey and Blanchard's (1993) situational leadership theory were used to better understand the behaviors and actions of the groups of individuals conducting succession planning activities. Through semi-structured interviews, 18 participants from Ohio's faith-based organizations provided their perspective on succession planning efforts that lead to a successful or failure outcome. The senior leaders offered recommendations for growing the executive leadership pipeline and described the practices used to identify future leaders. As the senior leaders navigated through the executive leadership and succession planning processes, they identified principles for building a comprehensive succession plan and discussed the accountability of the various groups of individuals involved for the activity's success. This study may be useful to administrators, researchers, organizational decision makers', and the individuals responsible for overseeing succession planning projects within the non-profit sector. Emphasis was placed on the general awareness of leadership continuity and non-profit organizations. The senior leaders provided direction on overcoming challenges within the succession planning process, which may lead to the failure to implement. Moreover, this study added to the body of knowledge by providing a strategy to reduce gaps within the executive leadership pipeline. The guidance provided by the senior leaders was intended to help individual non-profit organizations address their own circumstances and adjust accordingly. Data collected from semi-structured interviews,

documents, and archival records presented five themes: (a) the importance of rotating leadership, (b) defined role and responsibilities, (c) creating unity amongst the group, (d) documentation of standardized processes, and (e) staying mission-focused.

Presentation of the Findings

This multiple-case study consisted of two cases, which were categorized into different regions within the state of Ohio. In a purposeful sampling approach, the researcher collected primary data through semi-structured interviews and secondary data from documents and archival records. The researcher followed Creswell and Poth's (2018) five steps for analyzing qualitative data: (1) prepare and organize the data; (2) engage in initial exploration of the data; (3) use codes to develop themes; (4) interpret the meaning of results; and (5) represent the findings through narratives and visuals. Throughout this paper, the researcher has described the five steps utilized as part of the data analysis process; however, not all were conducted concurrently.

In step one, the researcher prepared and organized the data collected for the two case studies using Microsoft Excel and Word. The researcher created separate files on their computer's hard drive for each case. The researcher named the first case as *Case A*, which represented the first faith-based organization, and the second as *Case B*, which represented the second faith-based organization. Next, the researcher created subfolders for each interview participant by giving them a unique code. The folder included a copy of the participant's interview transcripts along with any documents they provided. The documents were saved and stored in a password-protected file that only the researcher had the ability to access.

To replicate the study, the samples used were comparable in size based on the membership numbers, industry, and structure. The study participants represented were defined as

senior leaders within the faith-based organization. Table 1 depicts a summary of the two faith-based organization's characteristics, alongside the comparisons, which were used for this multiple-case study. The data collected for Table 1 was developed through archival records available to the public from the faith-based organization's dedicated website. As shown, the first case study (Case A) represented a non-profit entity with a central office located in the eastern part of the state of Ohio. As of this study, the organization had 123,000 members, and the leadership structure was composed of 18 community volunteers and 17 paid staff members. The second case study (Case B) represented a non-profit entity with a central office located in the western part of the state of Ohio. As of this study, the organization had 133,000 members, and the leadership structure was composed of 14 community volunteers and 19 paid staff members. The researcher's findings suggested the two cases were sufficient to replicate this multiple-case study.

Table 1.

Characteristics of Faith-based Organization Groups

Region	Non-profit Industry	Leadership Structure	
	Number of members (N = 256)	Community Volunteers (N = 32)	Paid Staff (N = 36)
Case A			
Eastern Region	123,000	18	17
Case B			
Western Region	133,000	14	19

Note: Represents the number of members affiliated with Ohio's faith-based organizations as of July 7, 2022

The data collection process began with the recruitment of community volunteers and paid staff as potential research participants. Prior to the interview, the participants' completed a

screening survey (see Appendix A) to provide information about their background. The survey included 11 questions about the participant's demographical, professional, and educational experience with the organization. With permission from the pastor, the researcher contacted participants through email who were eligible for the study. The results from the screening survey were collected from participants through email.

After eighteen (18) participant interviews were completed and verified for accuracy, the researcher started the coding process. The researcher used a Microsoft Excel spreadsheet to track the data collected for the study. For the participants' demographical characteristics, the researcher generated table headings that included (a) name, (b) job title, (c) organizational name, (d) gender, (e) age, (f) years at the organization, (g) years in the profession, and (h) highest level of education. A second table contained the column headings which listed the interview dates, types of information collected, and file location. To protect the confidentiality of the study participants' workplace information, the researcher removed the column listing the original names, job titles, and organizational names, and replaced these categories with codes. However, the rest of the information contained in the tables remained unchanged. Using the participant's interview transcripts, the researcher assigned an alpha and numeric code of the letter (A or B) with a participant number (1-18). The label represented the participant's district and the order the interview was conducted. For example, a participant from Case A who was the third in line was labeled A3.

Screening Survey. From the screening survey, there were 18 out of 68 participants, giving a response rate of 26% for the study. The participants were a minimum of 18 years of age and consisted of former or current volunteers and employees of an Ohio faith-based organization. Additionally, the participants held a leadership role at the organization and had previously

participated in a search committee to appoint a new leader. The researcher's findings suggested the respondents were the appropriate population and that the sample size was adequate for a qualitative study. Aggregate demographic data pertinent to the expertise of panel participants appear in Tables 2. Displayed data for each demographic characteristic is according to frequency counts and percentages.

As shown in Table 2, data was collected from nine participants ($n = 9$) for Case A, who were located in the eastern region of Ohio. The sample used for Case A composed of five males (55.6%) and four females (44.4%), with the majority between the ages of 51 to 69 (55%). Most faith-based leaders spent six to ten years (77.8%) at their organization and maintained their leadership role for 10 years or more (88.9%). Further, the faith-based leaders primarily held a master's degree as their highest level of education (77.8%). Similarly, data was collected from nine participants ($n = 9$) for Case B, who were located in the western region of Ohio. The sample was composed of four males (44.4%) and five females (55.6%), with the majority between the ages of 51 to 69 (77.8%). Most faith-based leaders spent six to ten years (77.8%) at their organization and maintained their leadership role for 10 years or more (66.7%). The full sample had similar personal characteristics in terms of gender, age, years at the organization, years in leadership role, and the highest level of education.

Table 2.

Screening Survey Participant Characteristics

Participant Characteristic	Case A		Case B		Full Sample	
	<i>N</i>	%	<i>N</i>	%	<i>N</i>	%
Gender						
Female	4	44.4	5	55.6	9	50.0
Male	5	55.6	4	44.4	9	50.0
Age (Range)						
35-50	1	11.1	2	22.2	3	16.7
51-69	5	55.6	7	77.8	12	66.6
70-87	3	33.3	0	0	3	16.7
Years at the Organization (Range)						
6-10	7	77.8	5	55.6	12	66.7
10+ years	2	22.2	4	44.4	6	33.3
Years in Leadership Role (Range)						
6-10	1	11.1	3	33.3	4	22.2
10+ years	8	88.9	6	66.7	14	77.8
Highest Educational Level						
Bachelor's degree	0	0	2	22.2	2	11.1
Master's degree	7	77.8	6	66.7	13	72.2
Professional or doctorate degree	2	22.2	1	11.1	3	16.7

Note: Case A and Case B (n = 9). Full sample (n = 18)

Semi-structured Interviews. Prior to the participant interviews, the researcher emailed each participant a consent form to sign and return to the researcher. The consent form included information about the study, permission to record and transcribe the interviews with Microsoft Teams, and the steps participants could take should they no longer decide to participate in the study. Participants had the option to choose the time and location they felt the most comfortable with answering questions. The researcher utilized an interview guide (see Appendix B), which the participants from both cases were asked the same questions. However, some responses to the questions prompted clarifying or probing questions. Participant interviews were audio and video

recorded on Microsoft Teams and each lasted between 15 to 25 minutes in length. After the participants' verified their transcripts, the researcher conducted the coding process.

Data Saturation. To better understand the succession planning efforts within Ohio's faith-based organizations, the researcher needed to interview 15 to 30 participants to reach saturation. Sowerbutts and Burden (2019) posited the number of interviews required for data saturation in a qualitative study were 15 interviews per category. To track data saturation for this study, the researcher developed a Microsoft Excel worksheet listing the interview questions and the participants' answers. Row A2 through A11 listed the interview questions, and rows B2 through S2 listed the participant's number. In columns B2 through S17, the researcher copied and pasted the participants' responses to the respective interview questions listed in columns A2 through A11. Between six to 12 interviews, the researcher noticed the responses to the interview questions were repetitive or similar in nature. To ensure that no new information or knowledge was obtained, the researcher continued to add more participant interviews. After conducting six more interviews, the researcher decided to conclude the interviews because no new information had been obtained; therefore, data saturation had been reached.

After conducting each participant interview, the researcher performed member checking by verifying with the participants' that their responses were recorded accurately. At the conclusion of each interview, participants were emailed a copy of their interview transcripts within 48 hours. In the email, participants were asked to review their interview transcript for accuracy and provide feedback to the researcher within a week. Of the 18 participants, 15 (83%) responded by email, stating they did not have any revisions to make to their interview transcript. Whereas three (17%) responded by phone and confirmed with the researcher that they had read their interview transcript and did not have any revisions to make. Next, the researcher removed

all identifying information from the interviews and the organizations represented in the study. The researcher did not keep any data that linked the participants to their interviews.

In step two of the data analysis, the researcher engaged in the initial exploration of the data by reading and memoing emergent ideas (Creswell & Poth, 2018). The researcher conducted two rounds of analyzing the data collected to generate the themes. In the first round, the researcher read each interview transcript three times to immerse themselves in the data. As the researcher read each interview, they used Microsoft Word's track changes feature to add notes about their initial thoughts and marked sentences and paragraphs of the participants' responses. As the researcher viewed the data line by line, they highlighted the participant's most frequently used words in different colors. Next, the researcher used Microsoft Word to combine the interview transcripts into one file and sorted them according to the interview questions. Last, the researcher copied and pasted the relevant quotes highlighted from the interview transcripts into a Microsoft Excel spreadsheet.

In the second round of coding, the researcher used the NVivo software to assist the researcher with searching the categorical descriptions used for coding and identifying the themes and patterns developed from the participant interviews. The researcher converted the Word file containing the interview transcripts into a text file and imported it into the NVivo software. The NVivo software sorted the files and captured the text that was potentially missed by the researcher through the hand coding process. After one round of executing the software, the data captured from the NVivo software was added to the Excel spreadsheet for further analysis.

Documents and Archival Records. Documents and archival records that were originally created by Ohio's faith-based organizations were retrieved from their website, which was available to the public. For example, job descriptions and the organization's policy manual were

used to obtain information about the group of individuals (i.e., the bishop and appointive cabinet, the director, the search committee, and the executive) responsibilities for leadership transitions. Further, organizational charts were used to depict the hierarchy levels, the makeup of the executive leadership structure, and relationship between the groups of individuals assigned to succession planning tasks. Company newsletters produced between 2016 and 2022 were used to obtain information about the announcement and departures of executive leaders. The researcher collected 10 articles about the recruitment and selection of executive leaders, leadership transitions, appointments, and the succession planning process at the organization. The information obtained from the articles helped capture information (i.e., accurate dates and timeframes) that was missed during the participant interviews.

The researcher duplicated the process of analyzing the interview transcripts for the data collected from the documents and archival records. During the interviews, the researcher asked participants' if they had any documentation (i.e., job descriptions, policies, annual reports, and meeting notes) that they would be willing to share with the researcher. Some participants' indicated they did not have documents to share but directed the researcher where to find the information online. Others provided copies of their organization's meeting notes, but the documents obtained were outdated or unrelated to leadership appointments or succession planning.

The researcher triangulated the data by comparing the information from the participants' interviews with relevant organizational documents (i.e., job descriptions, policies, annual reports, and meeting notes) found online at Ohio's faith-based organization dedicated website. Following data collection, the researcher transcribed and uploaded the interviews into the NVivo 12 software. Additionally, the researcher used the same process to analyze the documents and

archival records collected from the participant and the organization. In the first round of coding, the researcher copied and pasted the text from the documents obtained online. For the documents that were scanned and emailed by the participant, the researcher retyped the information into a Microsoft Word document. Similarly, the researcher read the document three times, analyzed the document line by line, and highlighted the relevant themes. In the second round of coding, the researcher imported the documents into the NVivo software for further analysis that was added to the Excel spreadsheet containing the participant interviews. The researcher's findings suggested the number of documents collected was appropriate for this study.

Themes Discovered

Step three of the data analysis involved the researcher generating codes for the themes discovered in the study (Creswell & Poth, 2018). The researcher compared the themes discovered from the interviews with the conceptual framework, specifically Hersey and Blanchard's (1993) situational leadership theory, to determine if the themes discovered aligned with the concepts and constructs designed for this study. Additionally, the researcher compared the emergent themes with the themes demonstrated in the research questions and the academic literature. The researcher separated the data collected from the participant interviews and the archival documents into five broad categories related to executive leadership selection and succession planning efforts. Each category was organized according to the most frequently used quotes or keywords identified in the participant interviews, documents, and archival records.

The five categorical themes that emerged from the data were defined as follows:

1. Appointment - The first theme titled *appointment* reflected the participants' perspective of the organization's strategy to fill gaps within its leadership pipeline for executive leadership positions.

2. Organizational Roles - The second theme titled *organizational roles* reflected the participants' perception of the stakeholder's roles and responsibilities in the executive leadership selection and succession planning processes.
3. Prayer - The third theme titled *prayer* reflected the participants' perspective of a positive experience while working on group assignments (i.e., succession planning).
4. Process - The fourth theme titled *process* reflected the participants' perception of the resources and tools the organization provided to assist group members with the executive selection and succession planning activities.
5. Mission - The fifth theme titled *mission* reflected the participants' perception of the organization's strategy to prioritize executive leadership successions.

As shown, Table 3 represents the five categorical themes that emerged from the data collected from the participant interviews and the five themes that were related to the topic of executive leadership selection and succession planning efforts within Ohio's faith-based organizations. Additional information about the categories and themes is available in the Interpretation of Themes section.

Table 3.

Identified Themes

Participant	Categorical Theme	Exemplary Quotes
A9	Appointment	“We use a rotating process to move our leaders to the places they belong. It’s not about going from place to place...It’s about helping them utilize their job skills.”
A7	Organizational Roles	“Our role is to generate a list of potential candidates to give to the bishop. Sometimes the district manager will search for candidates to work in the smaller branches. However, the bishop is the only one that has the final authority to appoint the person.”
A5	Prayer	“We met for six weeks at different times. Sometimes It was early morning, mid-day, and sometimes in the evening. Every meeting opened with prayer. We shared our joys and concerns. Then the facilitator opened the floor for questions.”
B11	Process	“The HR manual at our organization provides a detailed and somewhat technical description of the appointment process. We strive to exceed those basic guidelines.”
B12	Mission	“First of all, the mission of our organization is our main priority. It is very important to remember that the individual chosen to lead the organization is appointed to lead the mission into the world. Adversarial relationships between the executive and the community cannot enhance the mission.”

Interpretation of the Themes

In step four of the data analysis, the researcher interpreted the meaning of the results generated from the study (Creswell & Poth, 2018). To provide a more robust presentation of each theme, the researcher renamed the categorical themes to make sense of the information gathered from the interviews. The first theme titled *appointment*, was renamed to the *importance*

of rotating leadership. The second theme titled *organizational roles*, was renamed to the *defining roles and responsibilities*. The third theme titled *prayer*, was renamed as *creating unity and momentum amongst the group*. The fourth theme titled *process*, was renamed to the *documentation of standardized processes*. The fifth and final theme titled *mission*, was renamed as *staying mission-focused*. A discussion of each theme is described in the following subsections.

Theme One: Importance of Rotating Leadership

Part one of the interview questions were written to better understand the participants' perspective of the organization's process for recruiting, identifying, and qualifying candidates for executive leadership positions. Negro and Mesia (2020) stated when leaders were put in situations that caused them to adapt, they could better manage unpredictable changes that occurred in the workplace. Across both organizations, participants' expected leaders were willing and ready to transfer to different branches within the organization without hesitation, even if it meant relocating to another state. Several participants emphasized the reasoning behind the leadership changes was based on religious principles. Some participants believed that leaders who moved from place to place were more effective than those who settled at one organization. Others suggested that job rotations helped executives overcome "boredom and burnout" with their job. Nevertheless, the organization's objective was to match a leader's "gift and talent" to the organization's "needs". Participant A7 remarked:

"Leadership appointments are best when everyone acknowledges that our organization has a leadership rotational system, not a leadership placement system. With a rotational system, this means we send our leaders where God needs them to be. We believe that God matches their gifts to the opportunities available within our faith-based organization's various branches."

In response to the second interview question, the participants' emphasized that high-ranking clergy were appointed to leadership positions after they graduated from theology school. Nevertheless, they affirmed that laity (non-clergy) executive leaders were appointed to leadership positions after attending one orientation session. The participants' assumed that incoming executives came with the knowledge, skills, and abilities to perform the job. Most of the participants' stated executives did not receive formal training for leadership positions unless the individual was "being groomed" to become a pastor.

The participants' stated executive leaders that fell under the same rotational system and the executive was fully aware of the organization's job relocation policy. Moreover, they indicated that the organization regularly rotated its leaders from one branch to another within its district. Participant A4 explained,

"No one is exempt from being moved. Either you are reappointed at the same location or moved. I have seen both good and bad leaders. Some are talented and others not so much. The good thing about rotating leaders is that the bad ones will leave and go somewhere else. I hate to see the good ones go though."

The responses aligned with the situational leadership literature. For example, Hersey and Blanchard (1993) noted that the leader's behavior is adjusted according to the situation, and their willingness and readiness are measured based on their ability to complete tasks, but as a team effort. Across both organizations, the participants' perceived that job rotations allowed the organization to function even if the executive retired or resigned. Participant B16 revealed, "If you had to replace everybody, every year, then you would lose the continuity of leadership. By rotating leaders every 3 years or so, we can keep [the] continuity of leadership from year to year."

The responses regarding the faith-based organization's actions and behaviors aligned with the academic literature. For instance, Lynch et al. (2016) found that it was important for the leader and follower to work together to create a person-centered culture. Several participants' stated the organization would replace their existing leader if they felt he or she was not a good fit for their branch, which allowed executives to find another position within the organization without hard feelings or recourse. Participant B18 remarked,

“Under the rotational leadership system, the church has the opportunity to request a leadership change or ask to keep the same leader. The leader could put in a request for the change as well. However, no guarantees can be made. Decisions regarding executive leadership replacements are based on the needs of the church.”

Summary of Theme One: Importance of Rotating Leadership. The theme of *the importance of rotating leadership* reflected the organization's strategy to fill gaps within its existing leadership pipeline. In support of the academic literature, faith-based organizations used job rotations as a reason to implement succession planning for executive leadership positions, which allowed the group to visualize what the future should state of the organization should look like. The participants' expected that job rotations for executive leadership positions would be conducted frequently. Therefore, the concept of replacing its existing leaders minimized the reception of negative responses that could potentially cause people to resign from the organization. According to Hersey and Blanchard (1993), using situational leadership to maximize productivity required the leader to pay close attention to the follower's strengths and weaknesses. Stewart (2017) found when non-profit boards lacked conversations about retirements, they failed to implement succession planning efforts. Although the faith-based organizations' goal for rotating leaders was used to optimize the flow of leaders, it was an

effective strategy that produced a successful outcome. With the participant's perception that everyone was on one accord, rotating leaders added value to the executive leadership selection and succession planning processes.

Theme Two: Defining Roles and Responsibilities

Part two of the interview questions were written to understand the participant's description of the succession planning process at their organization. The participants' indicated the organization formed a leadership team composed of community volunteers and paid staff who represented various areas of the organization. The participants' stated the groups assigned to the executive leadership selection and succession planning tasks included the bishop and appointive cabinet, the district manager, and the search committee. The researcher reviewed the faith-based organizations' hierarchical structure for leadership appointments to better understand the duties and responsibilities of the group. The organization chart showed that the bishop and the appointive cabinet were responsible for appointing executive leaders within their geographical region. The appointive cabinet included the bishop's assistant and the director of business development. Alongside the bishop, the district manager assisted with leadership appointments in terms of organizational planning and supervising the executive leaders within their district. The search committee engaged in succession planning activities exclusively for their branch. Together, the teams worked hard to ensure executive leadership transitions were efficient and effective.

As shown, Table 4 provides a visual alignment of the participant's perception of the roles and responsibilities that were assigned to the bishop, the district manager, and the search committee. The researcher's findings suggested that the participant's perception of their roles and responsibilities helped influenced the organization's ability to achieve a successful outcome

for the appointment of executive leaders. For instance, Kuenzi and Stewart (2017) revealed that it was necessary for team members involved in the succession planning process to differentiate the roles amongst several groups within the organization.

Table 4.

Roles and Responsibilities in the Succession Planning Process

Position	Participant	Exemplary Quotes
Bishop	B11	“The role of the bishop is to appoint candidates. They are ready to meet with the search committee as needed.”
District Manager	B12	“Every year the district manager reviews leadership positions at each site to make sure that the local churches are well-served... To ensure there is an uninterrupted line of continuity when it comes to replacing leaders. Each district manager will meet with the executive leader in the winter or the spring to schedule a consultation with them. Also, during this time, the district manager meets with the search committee. Once all consultations have been completed, the district manager will call the executive leader to tell them about their appointment.”
Search Committee	B14	“The search committee is an advisor to the bishop and the district manager. Members of the search committee are responsible for making sure everyone adheres to the personnel policies. We are in charge of hiring and compensation. We are expected to meet quarterly to develop staff job descriptions, groom and mentor candidates for leadership positions, write policies, and recommend candidates ready for appointments.”

In the second interview question, participants’ were probed to reflect on how the facilitator and the group members made decisions regarding succession planning activities. Hersey and Blanchard (1993) found that in a delegating leadership style, the leader believed the follower had the tools necessary to complete the task. As a result, the leader consulted with the follower for their opinion when making decisions. Across both organizations, the participants’ perceived the bishop and the district manager believed or trusted that the search committee could

perform succession planning tasks independently. However, when problems or conflicts arose in the group, the district manager stepped in to assist them. Participant B11 explained,

“As a committee member, we must maintain confidentiality [during leadership transitions], and if, and when conflict arises [amongst the group], we will invite our district manager [*sic*] into the conversation. We may have to write him or her a letter outlining the various points of view.”

Tebbe et al. (2017) recognized leadership transitions put timing constraints and unique demands on non-profit organizations. The respondents verified that they received an advanced notice from the organization about upcoming executive leadership resignations, which prompted them to prepare for transitions. They expressed that in some cases, the request to replace a leader was trivial, while in others the need for a replacement became a top priority for the organization. Participant A3 indicated the shortage of leaders was a major concern for organizational decision-makers, “We knew that more than a dozen of executive leaders would be retiring, and the need to find successors for them became urgent.” Participant A2 added, “And, faulting the bishop about the timing involved for having to get a replacement [*sic*] or anything else was not the way to go.”

The participants’ spoke about the timeframes required for succession planning activities. Collectively, the responses for the start times of the succession planning activities varied. Several participants’ recalled that succession planning activities began in the spring, while others indicated it was toward the end of the winter. For instance, Participant A4 stated, “We had our first meeting in January, and we all agreed that a deliberate pace was needed to select a new leader.” While Participant A8 explained, “In the spring, the committee will meet to gather a list of all the names and the locations that will anticipate a leadership change.”

Subsequently, there were mixed reviews about the expected turnaround time for the completion of succession planning activities. Participant A7 recalled that the search committee was given six months to complete succession planning activities, while Participant A9 concluded they were given a year. However, the unanimity amongst the participants' was the target date for the completion was summer. Hence, the participants' revealed it was in June or July when the bishop announced new leadership appointments to the community.

Summary of Theme Two: Defining Roles and Responsibilities. The theme of *defining roles and responsibilities* reflected the participants' perception of the stakeholder's involvement in the executive leadership selection and succession planning process. Several academic scholars found when there were role clarity issues regarding the scope of work, it leads to the failure to implement succession planning efforts at nonprofit organizations (McKee & Froelich, 2016; Stewart, 2016; Stewart, 2017, Stewart et al., 2020). In contrast to the academic literature, the participants' responses lead to the conclusion that the organization properly delegated the roles and responsibilities amongst stakeholders for succession planning efforts, which lead to a successful outcome. Stewart et al. (2020) indicated non-profit organizations should allow four months to prepare for leadership transitions. Subsequently, the responses reflected the organization gave the stakeholders enough time to prepare for leadership transitions, which lead to a successful outcome.

Theme Three: Creating Unity and Momentum Amongst the Group

Part two of the interview questions were written to understand the participants' perspectives of the interactions between the facilitator and the group during the succession planning activity. Hersey and Blanchard (1993) found in a participating leadership style, the follower already knew how to set the goals, so the leader's duty was to support and encourage

them. The leader also took into consideration that every follower was motivated by different things (Hersey & Blanchard, 1993). Only individuals that were elected as a search committee member were allowed to discuss sensitive matters like leadership appointments in their meetings. The search committee members created a welcoming environment where everyone was invited to express their personal views and opinions about leadership changes. Across both organizations, the participant interviews demonstrated how group members were motivated during succession planning initiatives. In response to the second question, participants' perceived that group members had a positive experience being on the search committee member.

Participant B13 shared,

“What is interesting is when you bring people from different backgrounds, different careers, [*sic*] different levels of education. It is interesting when you put all of those differences together in the room, but work to accomplish them as a whole. It doesn't mean that everybody doesn't get along, but you have a certain level of respect. I don't ever feel like I'm being ignored or overlooked because [*sic*] I'm the youngest person in the room.”

Participants' shared that the facilitator and the group conducted prayer or sang devotionals before and after the meetings to help the group stay focused and motivated. Participants' revealed at each meeting they were inspired to take turns leading the prayer or singing an inspirational song. Participant A2 believed, “Prayer helps us center on God's will. It helps us to refocus as a group so there is less fear, uncertainty, and doubt when conducting our work.” Several participants' shared that incorporating prayer as part of the process added value to the organization's goal of appointing a successor. Participant A5 reflected,

“As a committee member and representative of the church, we have to support the bishop in prayer and do what the church has asked them to do. And [sic] sometimes we make mistakes with selecting the right leaders. Just because things may not go as planned, we must keep praying that everything will be okay, and we are making the right decisions.”

Summary Theme Three: Creating Unity and Momentum Amongst the Group.

The theme creating unity and momentum amongst the group reflected the participants' perspective of a positive experience as a group member assigned to succession planning projects. Tebbe et al. (2017) indicated non-profit organizations that misunderstood the challenges of leadership successions were hesitant to engage in the process, which lead to the failure to implement. The responses indicated that some of group members did not have a clear understanding of the process; however, they had supportive management. Perna (2018) indicated that situational leadership was linked to teamwork and the communication pattern of leaders. The responses highlighted that prayer brought the group together before they decided to take on the challenges. The participants' suggested that incorporating the concept of prayer as part of the succession planning activity made them committed to achieving their goals. The participants' responses can lead to the conclusion that creating unity and momentum amongst the group helped them work together more effectively as a team, which contributed to a successful outcome.

Theme Four: Documentation of Standardized Processes

The second part of the interview questions were written to understand the directions the facilitator provided as they formed the search committee for the succession planning activity. Zigarami and Roberts (2017) found that to foster a mutual understanding between the leader and the follower, there must be a fit between the manager's situational leadership style and the

follower's expectant leadership style. The participants' expected that new people joining the search committee member would receive on-the-job training to help them prepare for leadership transitions. Hersey and Blanchard (1993) found that in a directing-telling leadership style, the leader provided specific instructions about the goals but closely monitored the follower's performance. Throughout the interviews, participants' verified that everyone in the organization used the same manual and had access to the information that assisted the group with leadership transitions. The purpose of the manual was to list the general rules and responsibilities of the faith-based organization. The participants' explained that once the new members of the search committee were trained, the facilitator provided less supervision and allowed the group to make decisions independently. Participant B13 explained,

“Everyone has a voice. Everyone is able to talk about what is on the agenda and start preparing or trying to plan out what to do next. Everyone has the chance to talk about what they think is important. If they don't have an opinion, they just don't say anything on certain [*sic*] topics.”

The respondents stated the search committee team included a minimum of five people and a maximum of nine people. They stated that search committee members were elected for a (one) three-year term and there had to be at least one young adult on the team. Additionally, no individuals from the same household were allowed to be on the committee at the same time. The participants' selected to be part of the search committee were scouted by previous or current members serving in the role. Participant B13 stated,

It would be great if a young person out of school would want to take on the responsibility [as a search committee member]. I don't believe that anyone's necessarily groomed to step into the role. I think more members [outside of the leadership team] should be aware

and mindful [of] what is happening with our organization and take part in making things happen.

Summary Theme Four: Documentation of Standardized Processes. The theme documentation of standardized processes reflected the participants' perception of the resources and tools provided by the organization to assist group members with the executive selection and succession planning processes. Stewart and Twumasi (2020) indicated poor planning and miscommunication lead to a failure to implement succession planning projects within non-profit organizations. In contrast to the academic literature, the responses lead to the conclusion that the faith-based organizations provided the group with the appropriate tools and guidance necessary to complete the task independently, which leads to a successful outcome. With everyone in the organization participating in the same training, the team could focus on common goals and objectives associated with the succession planning activity.

In support of the academic literature, the analysis of the interviews indicated when organizations documented their standardized processes, it influenced the team's ability to implement succession planning for executive leadership positions. For instance, Ballaro and Polk (2016) stated the level of guidance, training, and tools used to prepare groups for succession planning and leadership transitions were key to understanding the assignment of specific tasks in the process. Furthermore, the discussions supported indications displayed in the academic literature that in-house training programs for succession planning efforts were essential when attempting to identify future leaders. Stewart et al. (2020) found that formal training programs for succession planning allowed leaders to gain valuable experience while sustaining performance.

Theme Five: Staying Mission-focused

Part three of the interview questions were written to understand the ways the facilitator helped the group overcome challenges associated with the succession planning activities. Hersey and Blanchard (1993) found in a selling leadership style, the leader sets the goals and consulted with the follower. The academic literature explained teams conducting succession planning activities needed to understand the mission and constraints of the organization (Landry, 2018). Across both organizations, participants' made it clear that appointments were based on the individual's ability to fulfill the mission and ministry of the non-profit. Participant B12 reflected,

“The needs of the community and the overall mission of the organization is taken into consideration. The leader of the organization needs to have the right credentials, mission outreach, and the ability to show compassion towards the community. They [executive leaders] are appointed to serve the community, lead the mission, and do great things in the world. Our [the faith-based organization's] needs must be taken into consideration.”

The second question was written to understand the participants' perspective on recommending changes to the succession planning process. The participants' responses aligned with the academic literature. For instance, Santora et al. (2019) indicated that organizational policies developed for succession planning for executive leadership positions were created to maintain the status quo and that new ideas could lead to negative outcomes. There were mixed responses about whether the organization should make changes to the existing process. Some respondents felt the current process established by the organization was designed properly, while others recommended some changes or did not have a comment. Participant B13 believed,

“I don't think any changes should be made to the process. Because if there wasn't a committee to “bounce ideas off” [get an opinion from] each other to talk about different

things, one person would be making all of the decisions and I don't think that's how any faith-based organization should be run.”

Participant B18 added,

“Changing the process would mean we have to “demur” [raise doubt or objections] from the mission. We have no plans to demur from the mission of the organization. [The appointment process] it's not easy. It's labor intensive and needs to be “tethered to” [tied the mission] every year. I think there needs to be an ongoing conversation between the executive and the district manager every year.”

Currently, the in-house leadership pool comprised of the names of executives located in the state of Ohio. Participant B16 recommended changes to the appointment process by allowing candidates outside of their district to be considered for executive leadership positions. Participant B16 explained,

“[In our district] we are in the process of implementing a new policy that will allow the different branches to announce their upcoming vacancies from retirements. And with what we are doing is posting [jobs for] those sites. The executive [outside of that region] will get to express their interest in moving to that branch. All they [the candidate] need to do is email their district manager of the location announcing the vacancy and the district manager [that they currently report to] as well. What this does is bring additional names into the hat [leadership pool of candidates]. This is something that has worked for our other branches...Like in Minnesota, Michigan, and Illinois. Let me also say, there are no guarantees. We are only doing this with a small group of executives. But if it works out, we may launch it permanently.”

Summary Theme Five: Staying Mission-focused. The theme *staying mission-focused* reflects the participant's perception of the organization's strategy to prioritize executive leadership successions. Tebbe et al. (2017) stated non-profit organizations failed to implement succession planning projects when there is a lack of awareness amongst the group members. In contrast to the literature, the participant's responses lead to the conclusion that they were aware of the faith-based organization's mission and understood the purpose of its formation. Moreover, Schlosser et al. (2017) found that non-profit boards tended to focus their attention on issues related to their mission. The participants' responses lead to the conclusion that with the mission at the forefront of everyone's mind, the participants' progressed towards the organization's goals, leading to a successful outcome. Sawhill and Williamson (2001) determined that success was based on the non-profit organization's ability to accomplish mission-based goals that were easily communicated to the stakeholders. For this study, the participants' expressed enthusiasm as they discussed their level of commitment to the mission of the organization. Further, they acknowledged that leadership changes were in the best interest of the faith-based organization and aligned with its strategic goals.

Representation and Visualization of the Data

In step five, the researcher represented the findings of the study through narratives and visuals (Creswell & Poth, 2018). The researcher used a table format that assisted with creating a visual picture of patterns in the data. As shown, Table 5 highlighted the representation and visualization captured in the study. Moreover Table 5 represents the alignment between (a) the themes discovered, (b) the interview questions, (c) the situational leadership academic literature, and (d) participant exemplary quotes.

Table 5.

Representation and Visualization of the Data

Themes Discovered	Interview Questions	Relationship to Situational Leadership	Exemplary Quotes
Importance of Rotating Leadership	1.1, 1.2, 1.3	Situational leadership focuses on the leader's ability to adapt or change his/her leadership style to the situation. The situational leadership theory states that no leadership style is better than the other (Negro & Mesa, 2020).	"There are times when the bishop will ask for a leadership change because of the needs of the organization. We recognized that leadership changes are an ongoing process. And we try to be very sensitive to the leadership structure of our entire organization." (Participant A9)
Defining Roles and Responsibilities	2.1, 2.2a	A delegating leadership style incorporates a "hands-off" approach. Group members make most of the decisions and take most of the responsibility for what happens (Bhasin, 2019).	"The district manager helps with leadership transition by occasionally checking in with the search committee and he/she participates in our phone conversations." (Participant A8)
Creating Unity and Momentum Amongst the Group	2.3a	In a participating leadership style, the leader offers less direction and allows members of the group to come up with ideas and decision-making (Blanchard et al., 2013).	"It's our responsibility to recommend and suggest the candidate who is best suited for our organization. So, it is done in a prayerful manner. It's a very thoughtful process with a lot of moving parts and covered in prayer." (Participant B16)
Documentation of Standardized Processes	2.2b	In a telling leadership style approach, the leader tells group members what to do and how to do it (Bhasin, 2019).	"Our HR manual gives us a detailed and somewhat technical description of the process and the steps involved. The committee needs to follow that [book] to the tee." (Participant B11)
Staying Mission-focused	3.1a, 3.2	In a selling approach, leaders "sell" their ideas to get group members to buy in the process (Hersey & Blanchard, 1993).	"They [future leaders] are appointed to serve our faith-based organization with the goal to lead us and guide us through the mission and ministry." (Participant B14)

Relationship of the Findings

This section discusses the relationship of the findings and the research questions, the conceptual framework, the anticipated themes, the literature, and the problem. The research questions address the relationship between the themes in the interview and the selection process

for the executive leadership position and the usage of succession planning. The conceptual framework highlights the relationship between a faith-based organization's decision makers' and the executive leadership selection and succession planning processes. The anticipated themes compare the interviews that emerged from the interviews and the literature on the executive leadership selection and succession planning process. Further, the researcher discusses the linkage between the themes identified in the interviews and the general problem of the potential lack of succession planning, resulting in the inability to identify future leaders within non-profit organizations.

The Research Questions. An interview guide was used in the data collection process to capture the study participants' perception of the executive leadership selection and succession planning processes at their faith-based organization. In the interviews, participants' were asked nine questions that helped the researcher to better understand the potential lack of succession planning, resulting in the inability to identify a future leader. The three research questions for the study were:

RQ1. What are the factors used by faith-based organizations to select executive leaders?

RQ2. What factors contribute to the successful implementation of succession planning efforts for executive leadership positions at faith-based organizations?

RQ3. What factors contribute to the failure of succession planning efforts for executive leadership positions at faith-based organizations?

Research Question One

The first research question was written to understand the factors used by faith-based organizations to select executive leaders. The participants' responses aligned with the academic literature. For instance, Barton (2019) found that decision-makers at Christian Universities were

influenced by their organization's historical and religious cultural norms when choosing the next leader. In the interviews, participants' gave their perceptions of the recruitment and identification process for candidates seeking executive leadership positions. Additionally, the participants' spoke about the skills and competencies required for executive leadership positions. Across both organizations, participants' noted that leadership appointments were based on four broad categories: (a) the needs of the church, (b) the mission, (c) the leader's ability to use their talents and gifts, and (d) the leader's willingness and commitment to move from place to place.

First, the participants' expected that executive leaders were appointed to a particular location because the individual was a "good fit" in terms of the size of the organization, financial condition, and leadership qualities. Second, the participants' expected the leader to be committed to the mission of the organization and their work in the community. Hunter and Decker-Pierce (2020) noted a leader's personal characteristics, professional, and mission-related skills were important aspects of non-profit leaders. The participants' perception was the newly appointed executive leader would have a connection with the members of the community and the programs designed by the non-profit. The participants' expressed the leader added value to the organization by increasing membership numbers as opposed to being the reason membership numbers were declining.

Third, the participants' expected that leaders were matched to their location based on their ability to use their unique talents and gifts. The participants' perception was the leader's unique talents and gifts included their academic background, performance record, and skills and abilities. The leader was expected to be current with completing continuing education courses (i.e., leadership development) designed by the organization. Moreover, the leader had experience with church administration and leading and motivating staff. Last, the participants' expected that

leaders were committed to the organization's job rotational policy. The researcher's findings suggested that the participant's perspectives on succession planning for executive leadership positions were related to the five themes.

Research Question Two

The second research question was designed to understand the factors that contribute to the successful implementation of succession planning efforts for executive leadership positions at faith-based organizations. Across both organizations, the participants' shared the process they used at their faith-based organization to conduct succession planning for executive leadership positions. Hersey and Blanchard (1993) stated the leader used a delegating style when the follower had a high-level of readiness. The participants' explained leadership successions were conducted seasonally and was a shared effort amongst several groups of individuals. Most participants' were aware of their role within the succession planning process. Participant A2 explained, "The search committee provides the bishop copies of job descriptions, compensation reports, and a list of potential candidates, and current annual evaluations of all staff."

McKee and Froelich (2016) stated the concept of succession planning was not about replacing the executive leader, rather the process should be viewed as leadership continuity. In support of the literature, the participant's responses indicated they understood the role they must play to sustain leadership continuity and fulfill the mission of the organization. For instance, Participant B12 stated,

"The movement of executive leaders is to help meet [*sic*] the missional needs of our organization. It is a manifestation of our connection. Our leaders are appointed to serve [*sic*] and lead our mission into the world. Adversarial relationships [conflicts amongst the stakeholders] do not enhance the mission."

The participants' revealed that the team and the organization built a system of trust that the strategy and tools designed for succession planning activities worked when leading and implementing succession planning projects. Participant A1 explained,

“The key to success is not to jump immediately into the grind. We used surveys to gather the attitudes [of the group], view [*sic*] issues, and ensured everyone's opinion can be heard. Surveys helped provide unbiased data, and to inform the discussion of the team”.

Moreover, the organization provided the team with a supportive leader who helped them overcome the challenges associated with the process. Across both organizations, the facilitator incorporated prayer to create unity and momentum amongst the group. Participant B14 added,

“There are hundreds of hours involved in appointments, we go into prayer and meditation before we make a decision. We pray for our new leader and their family every day. And pray that God will enable us to work supportively with him or her.”

The participants' expected that leadership appointments were carefully planned before implementing leadership changes. For instance, the group held monthly meetings to discuss potential leadership changes in their district. Before leadership transfers occurred, the district manager met with the executive and the local branch on separate occasions to discuss the transitions. The meetings helped the team to accept and embrace leadership changes gradually. The facilitator provided the group with an agenda, which helped them to prioritize leadership appointments. For instance, the participants' explained that the new graduates and local branches with declining budgets were among the first tasks addressed on the list. Stewart and Diebold (2017) suggested nonprofit organizations experiencing financial distress were more likely to experience turnover for executive leadership positions. Moreover, the participant's perspectives

on the successful implementation of succession planning projects are related to the five themes in this study.

Research Question Three

The third research question was designed to understand the factors that contribute to the failure to implement succession planning efforts for executive leadership positions. The participants' described the constraints that limited succession planning projects at their faith-based organization. Some of the constraints for the group included the scope of the work, time, costs, and risk. Across both organizations, the participants' expected leadership transitions to be disastrous when the team failed to understand the scope of work. Although new and existing members were trained, there was still conflict amongst the group. Participant B16 stated,

“No one really wants conflict [in the group] and when it does happen not everyone wants to deal with it. However, not all conflict has to be bad. It all depends on how it is approached and resolved. As followers of Christ, sometimes you will need to speak the truth [to each other] in love. We should listen and respect each other's opinions.”

When there were conflicting views that could not be resolved amongst the group, the facilitator called the district manager to intervene. After the district manager was able to identify the root cause of the problem, the team was able to move forward with completing the succession planning activity.

The participants' responses aligned with the academic literature. For instance, Tebbe et al. (2017) revealed when there was a lack of awareness or urgency for succession planning efforts, the team found it challenging to implement. Another area that the participants' spoke about when addressing the challenges associated with succession planning efforts was the timing involved in leadership transitions. Stewart (2017) indicated one of the mistakes that non-profit

boards made was rushing to complete the process, rather than taking the time they needed to make a decision. Several participants' described leadership successions as "taxing" or "time-consuming" and were impatient with new members engaging in succession planning projects for the first time. Participant A3 explained, "All we cared about was rushing the process to obtain our goal of finding a replacement leader."

Further, the costs were another major factor when considering succession planning efforts. Participants' explained that some of the team members were unaware of the operational costs involved with leadership transitions, which lead to difficulties in finding a new leader. Several participants' acknowledged that smaller branches had budget constraints as opposed to large-sized branches. The succession planning team's objective was to ensure the incoming executive's salary and compensation would not be decreased once the transfer occurred. Thus, it was the incoming branch that would be responsible for paying the executive leader's salary. Moreover, the local branches that had budget constraints were limited to the number of executives eligible to be transferred to certain locations.

Although leadership appointments were not discriminated against in terms of race and gender, the group (i.e., bishop, district manager, and the search committee) paid close attention to the executive's family size. The group's objective was to avoid putting the executive in a financial bind should their salary decrease as a result of the transfer. Additionally, the team had to consider the financial conditions of the branch. For instance, married executives with children were often placed at large-sized branches with higher budgets that could afford to pay higher salaries and compensation packages. In contrast, executives that were single or married with adult children were easier to place at smaller branches because their pay structure was lower.

Nevertheless, the participants' explained that they were consistently reminded by the facilitator that their objective was to fund the position and not the person.

Last, the risk of selecting the wrong leader was a major concern for the team working on succession planning projects. Matshobane and Masango (2020) stated sudden changes in leadership at a faith-based organization resulted in resistance from the public. Often, the participants' felt frustrated or discouraged after hearing the news about the outgoing executive's departure, which lead to several team members calling the district manager or notifying the bishop or the appointive cabinet requesting a reconsideration. However, the district manager and the appointive cabinet explained to the decision-makers at the branch that requests for reconsiderations had to be for missional reasons. Otherwise, the members of the local branch were encouraged to welcome and embrace the new leader. The researcher's findings suggest the participant's responses were related to the five themes identified in the study.

The Conceptual Framework. The conceptual framework designed for the study consisted of two processes, (1) executive leadership selection and, (2) succession planning within faith-based organizations. The researcher's findings suggest the themes are related to the concepts of this study. The executive leadership selection concept explained the three steps (i.e., recruitment, selection, and employment) organizations used to staff positions (Heneman et al., 2019). The five themes were related to the process of recruitment, selection, and employment at the faith-based organization. As mentioned previously in Theme One: Importance of a Rotational Leadership, the participants' explained the organizations developed a strategy to incorporate job rotations that allowed them to fill vacant executive leadership positions. Moreover, there was no training required by the organization because the executive already had the knowledge, skills, and abilities required for the position. As a strategy to make the organization more attractive

amongst future leaders, decision makers' prioritized hiring recent graduates before offering leadership positions to existing staff.

The succession planning efforts concept explained the five stages organizations experienced during the succession planning process: (a) engaged senior leaders, (b) mapped out a vision, (c) developed future leaders, (d) sought new talent, and (e) monitored and improved the process (Kramer & Nayak, 2013). As highlighted in the second and the fourth themes discovered, the participants' explained the various actors and their roles within the succession planning process. The linkage between the themes and the five steps associated with the succession planning process shows that the respondents went through the five stages. The researcher's findings suggested the five themes were related to the succession planning efforts concept designed for this study.

Situational Leadership Theory. The situational leadership theory posited that no leadership style was better than the other. Moreover, the leadership team represented in the study used all four leadership styles in a leader-follower relationship, which include: (a) directing-telling, (b) coaching-selling, (c) supporting-participating, and (d) delegating (Blanchard et al., 2013). The researcher's findings suggested the themes are related to the situational leadership theory that was used to understand the linkage between the decision-makers' leadership style, the process, and the potential outcomes. The five themes discovered in this study were related to the leadership style used at the faith-based organization.

Actors. Worth (2019) noted there were several stakeholders (i.e., executive leader, board of directors, human resources, and a candidate) involved in the succession planning activity for an executive leadership position. The participants' reflected that the bishop, appointive cabinet, district manager, and the search committee were among the various groups involved in the

succession planning activities at their faith-based organization. Moreover, the participants' provided their perspectives on the various roles and responsibilities of the group. The researcher's findings suggested the five themes discovered in this study was related to the involvement of actors and succession planning efforts at faith-based organizations.

Constructs. The two constructs designed for this study were: (a) potential successful implementation, and (b) potential failure of implementation. The researcher's findings suggest the themes are related to the constructs named *potential successful implementation* and *potential failure of implementation*. The participants' provided examples of succession planning activities that were related to outcomes of potential success in the five themes. Moreover, the participants' provided their perspectives on the succession planning activities that were related to outcomes of potential failure in Theme Three: Creating Unity Amongst the Group and Theme Four: Documentation of Standardize Process.

Anticipated Themes

The Former Career Path of Executives and Selection Criteria. One anticipated theme discovered from the literature asserted that the former career path of non-profit executives would be considered as part of the selection process (Hunter & Decker-Pierce, 2021; Norris-Tirrell et al., 2018; Stewart & Kuenzi, 2018). The researcher's findings suggest the themes from the interviews support the anticipated theme in the academic literature that the former career path of the executive leaders would be considered as part of the selection process. The participants' noted that executives appointed for leadership positions were qualified internal employees who were familiar with the organization's strategic objectives. Further, as noted in theme one, the participants' expected incoming executives used their talents and gifts to help run the organization.

Skillsets Used by Past Executives and Applicability to New Executives.

The second anticipated theme was the skillsets used by past executives were no longer applicable to future leaders (Hunter & Decker-Pierce, 2021; Rooney & Burlingame, 2021; Shera & Bejan, 2017; Stewart et al., 2021; Vito, 2018; Walk et al., 2021). The researcher's findings did not support the anticipated theme that skill sets used by past executives were no longer applicable to future leaders. The participants' did not discuss whether the specific skillsets used by past executives applied to future executives. However, the participants' noted the district manager and the search committee chose executive leaders through an in-house pool of qualified candidates with the desired skillsets necessary to perform the job.

Differences Between Executive Leadership Succession and Non-Profit Boards.

The third anticipated theme was decision-makers' (i.e., non-profit boards) frame of thinking about executive leadership succession in the past would differ in the future (Barton, 2019; Cavanaugh, 2017; McKee & Froelich, 2016; Pratt et al., 2018; Stewart, 2016; Stewart, 2017; Stewart et al., 2020; Varhegyi & Jepsen, 2017). The researcher's findings suggest the themes from the interviews supported the themes from the academic literature indicating leadership succession would differ in the future. The participants' revealed that their non-profit organization would be launching a pilot program that would allow executive leaders the ability to control where their next appointment would be as opposed to the organization assigning them. Moreover, the participants' indicated the organization was starting to consider the executive's family status prior to moving them to another location, whereby in the past the executive's private life was not a factor.

The Decision to Hire an Internal or External Candidate. The last anticipated theme was non-profit organizations would experience implications when deciding whether to hire an

internal or external candidate (Bruneel et al., 2020; Kuenzi & Stewart, 2017; Sherrer & Rezania, 2020; Varhegy & Jepsen, 2017). The researcher's findings suggested the themes from the interviews did not support the anticipated theme that nonprofit organizations would experience implications when deciding whether to hire an internal or external candidate. The participants' confirmed the organization found and prepared new leaders within their existing leadership pool. The organization was open to hiring external candidates; however, the person had to share the same religious faith. Additionally, the respondents expressed that the process designed by the organization was efficient and effective. The researcher's findings suggest that leadership deficits existed; however, this assumption only applied to some of the non-profit genres. For Ohio's faith-based organizations, the participants' stated there was an increase in the number of qualified executive leaders who were retiring. However, across both organizations, their strategy was to rotate leadership to help backfill vacant positions while recruiting new leaders.

Further, the researcher's findings suggest that no matter if the future leader was hired internally or externally, the organization would experience similar problems. For instance, the participants' suggested through the leadership rotational system they made mistakes within the selection process for executives. Although leaders were selected internally, mismatches between the leader and staff occurred, causing the organization to have to restart the selection process. Moreover, appointing a new leader internally did not affirm that the organization would not experience uncertainty and disruptions amongst the staff. In the interviews, the participants' stated the staff and community were encouraged to welcome their new leader.

The Literature. The review of the professional and academic literature in Section 1 provided a holistic view of the research related to the current body of knowledge surrounding executive leadership selection and succession planning efforts within non-profit organizations.

The academic literature noted the first commonly held assumption was non-profit boards did not take succession planning seriously, except for when they felt pressured by external stakeholders (Griffith, 2016; Hunter & Decker-Pierce, 2021; Miller, 2018; Stewart & Kuenzi, 2018; Stewart et al., 2020; Vito, 2018). Moreover, there was a lack of investment in leadership development programs sector-wide (Griffith, 2016; Hunter & Decker-Pierce, 2021; Miller, 2018; Stewart & Kuenzi, 2018; Stewart et al., 2020; Vito, 2018). The researcher's findings suggest the themes from the interviews do not support that Ohio's faith-based organizations did not take succession planning seriously and there was a lack of investment in leadership development programs. Across both organizations, the responses from the interviews indicated that faith-based organizations continuously prepared for succession planning. As noted in Theme Four: Documentation of Standardize Process, the organization ensured the group had instructions to persist with their succession planning efforts.

The second commonly held assumption was non-profit board members were hesitant about engaging in the succession planning process because they felt their leaders were irreplaceable (Barton, 2019; Kuenzi & Stewart, 2017; Stewart, 2016; Stewart et al., 2020). The researcher's findings support the themes from the interviews that some participants were hesitant about engaging in the succession planning process because they did not want to lose their current leader. However, many participants revealed it was a mutual understanding between the organization and the executive leaders that the position consisted of job rotations. As mentioned in Theme One: Importance of Rotating Leadership, the organization's objective was leadership continuity.

The third commonly held assumption was there were issues surrounding the role clarity for the scope of the work, and which group of individuals could manage the succession planning

process independently (Barton, 2019; Kuenzi & Stewart, 2017; Stewart, 2016; Stewart, 2017; Stewart et al., 2020; Varhegyi & Jepsen, 2017). The researcher's findings did not support the themes from the interviews that there were role clarity issues surrounding the scope of work. As noted in Theme Two: Defining Roles and Responsibilities, the organization laid out the responsibilities for the groups of individuals assigned to each task. The participants' disclosed there was contention amongst the group, but the issues were not who should lead succession planning activities. Further, Theme Four: Documentation of Standardize Process highlighted that the faith-based organization used a manual to separate the duties and responsibilities of the groups assigned to executive leadership selection and succession planning tasks.

The fourth commonly held assumption was decision-makers misunderstood the purpose of the succession planning process because they felt compelled to rush the process to find a new leader (Stewart, 2016; Stewart, 2017). The researcher's findings suggest the themes from the interviews supported the themes from the academic literature. As noted in Theme Two: Defining Roles and Responsibilities, the participants' indicated there were team members who wanted to rush the process. However, as highlighted in Theme Four: Documentation of Standardize Processes, the group received the same training and instructions to help them complete the tasks. Further, the participants' stated they were notified of the succession planning schedule before executive leadership appointments.

Last, the fifth commonly held assumption was non-profit boards from large organizations used third party recruitment firms, while small organizations hired individuals from their personal networks, bypassing individuals within their existing leadership pipeline (Biu, 2019; Norton & Linnell, 2016; Stewart, 2017). The researcher's findings suggest the themes from the interviews did not support that Ohio's faith-based organizations used third party recruitment

firms or bypassed individuals within their existing leadership pipeline. As noted in Theme One: Importance of Rotating Leadership, the participants' stated the organization used their in-house leadership pool or had their internal search committee recommend candidates for executive leadership positions. Further, the participants' acknowledged that the organization was working on a plan to expand its list of qualified candidates internally.

The Problem. The general problem addressed was the potential lack of succession planning at non-profit organizations, resulting in the inability to identify future leaders. Specifically, the researcher explored the problem within Ohio faith-based organizations. In Section 1, the researcher highlighted three examples from the literature about the problem. For instance, the academic literature stated several non-profit organizations knew their chief executive officer was planning to retire within the next four years, but refrained from hiring an internal candidate qualified for the position (McKee & Froelich, 2016). The researcher's findings did not support that Ohio's faith-based organizations refrained from hiring internal candidates qualified for executive leadership positions. As noted in the participant interviews, the district manager was aware of the upcoming executive leadership resignations and began the process of searching for replacements. Additionally, the participants' expressed that future candidates were selected from the organization's affiliated graduate schools and existing in-house leadership pools.

Another example from the academic literature was organizations could not identify employees ready for promotion because there was no plan to assess the competencies required for leadership positions (Ballaro & Polk, 2017). The researcher's findings did not support that Ohio's faith-based organizations could not identify employees ready for promotion because there was no plan to assess the competencies required for leadership positions. As mentioned in

Theme Two: Defining Roles and Responsibilities, the participant's interviews indicated the organization had specific duties assigned to the group of individuals involved in the succession planning process. For instance, the committee was responsible for providing names of potential leadership candidates, creating job descriptions, and copies of annual evaluations.

The last example from the academic literature indicated that 59% of non-profit organizations were left an average of six months without an executive leader as they failed to appoint an interim executive leader (Stewart et al., 2020). The researcher's findings for this study did not support that Ohio's faith-based organizations were left without an executive leader. The interview participants' gave specific timeframes from the beginning of the succession planning activity to the announcement of the newly appointed leader. As noted in Theme Two: Defining Roles and Responsibilities, the organization began preparations for succession planning in the winter months with a target date of completion in the summer.

Summary of the Findings

The themes identified in the study were developed from the participant responses. As explained in the academic literature, organizational decision makers within the non-profit sector had problems recruiting and identifying qualified leaders for executive leadership positions. The purpose of this qualitative multiple-case study was to explore the reasons behind the potential lack of succession planning, resulting in the inability to identify future leaders. The researcher's findings suggested the participant interviews were sufficient to answer the research questions guiding the study. The first research question was designed to understand the recruitment and selection process the Ohio's faith-based organizations used. The findings of the study revealed that Ohio's faith-based organizations' strategy to recruit candidates for executive leadership positions consisted of targeting graduate students or implementing job rotations.

The second and third research questions were designed to understand the factors that contributed to a successful or failure to implementation for succession planning efforts for executive leadership positions. The findings from the study revealed that Ohio's faith-based organizations were successful when the group of individuals assigned to succession planning tasks understood the importance of their role, trusted the process, and had a supportive leader. Additionally, the groups of individuals planned for executive leadership transitions annually. The organization's strategy was to ensure there were written policies and procedures surrounding the executive leadership and succession planning processes. Subsequently, the findings revealed Ohio's faith-based organizations failed to implement succession planning efforts when the group rushed the process and misunderstood the scope of the work, time, costs, and the associated risks. To address conflict, the team used divine intervention and sought the help of the district manager in times of distress and as a strategy to prioritize succession planning for leadership positions.

This qualitative multiple-case study revealed five themes that explain succession planning for executive leadership positions within Ohio's faith-based organizations. The two faith-based organizations represented in the study were from the eastern and western regions of Ohio. The data was collected from 18 participants' and obtained through interviews, documents, and archival records. The participants were over the age of 18, consisted of previous or current community volunteers and paid staff, had participated in a search to replace an executive leader, and held a leadership position at an Ohio faith-based organization. To analyze the data, the researcher used Creswell and Poth's (2018) five step process that helped identified five themes emerging from the data. The five themes emerging from the study were: (1) importance of rotating leadership, (2) defining roles and responsibilities, (3) creating unity and momentum

amongst the group, (4) documentation of standardized processes, and (5) staying mission-focused. The researcher's findings suggested that the five themes presented were interpreted to better understand the executive leadership selection and succession planning efforts within Ohio's faith-based organizations. Moreover, the five themes helped to support the three research questions, the conceptual framework, the literature, and the anticipated themes designed for this qualitative multiple-case study.

Application to Professional Practice

This study explored the topic of succession planning for Ohio's faith-based organizations and contributed to the body of knowledge within the non-profit sector. Decision makers at non-profit organizations needed a strategy to reduce the gaps in its leadership pipeline. The findings of this study addressed the ways nonprofit organizations may improve the general business practice and the potential applications strategies. The recommendations provided may contribute to the potential successful or failure of implementing succession planning efforts for executive leadership positions. Together, the findings from this study were applicable to the professional practice within the non-profit sector.

Improving General Business Practice

Five general business practices were identified in this study. First, this study may assist organizations with integrating succession plans as part of their hiring strategy. According to Heneman et al. (2019), job rotation programs were effective strategies organizations used for keeping talent in their leadership pool. Theme One: Importance of Rotating Leadership introduced job rotations as the primary strategy decision makers' used to reduce gaps within their existing leadership pipeline. Findings from this study revealed that the team recruited and identified successors as qualified candidates from affiliated graduate schools and internal

executive leaders. Job rotations were used to backfill vacant positions, while newly acquired candidates were hired with the understanding that there would be no guarantees the individual would remain employed at the same location for an extended period. Further, the executive's talents and gifts were matched to the organization's needs, which allowed the leader to maximize their performance on the job. The combination of using job rotations and recruiting candidates from affiliate graduate schools, as part of the hiring strategy, contributed to a successful outcome because the stakeholders trusted that it was the best approach.

Second, this study may help organizations with assembling a team to manage leadership transitions. Theme Two: Defining Roles and Responsibilities identified the basic requirements for the groups of individuals engaged in succession planning activities. Heneman et al. (2019) implied organizations failed to implement succession planning when successor appointments were relied solely on the responsibility of the current executive. McKee and Froelich (2016) stated staffing for core positions required identifying which groups of individuals would be performing each task within the succession planning process. Findings from this study indicated the work was divided amongst three groups of individuals, the bishop, the district manager, and the search committee at Ohio's faith-based organizations. Over a six-month period, teams invested countless hours preparing for executive leadership transitions. By dividing the workload amongst the three groups of individuals, it allowed the team to work more efficiently and effectively. The separation of duties leads to the successful implementation of succession planning efforts because the group was able to complete the task by the required deadline.

Third, this study may assist organizations with finding creative ways to increase productivity levels and build the teams morale when faced with a challenging task. Theme Three: Creating Unity and Momentum Amongst the Group reflected the facilitator's behaviors

and actions that changed their attitude and commitment towards the process. Stewart et al. (2020) found non-profit organizations failed to implement succession planning activities when they had a negative attitude towards the process. Integrating prayer helped teams develop a positive and optimistic attitude about replacing their existing leader. Findings from this study synthesized and summarized the methods and techniques group facilitators used during their meetings that restored trust amongst the team. Creating succession plans ensured there was an uninterrupted line of leadership and assisted the team with visualizing the future of the organization should the current executive be transferred to another branch, resigned, or retired. Although there were mixed reviews about replacing their leader, the team believed that integrating the act of prayer in the meetings was a collective effort that brought everyone together. Additionally, the principle and practices of prayer generated a positive effect amongst the team members, which helped the group focus on the importance of the activity and executing the task successfully.

Fourth, this study may assist organizations with providing clear instructions to teams who have never participated in succession planning activities or suggest improvements for those who are familiar with the process. Succession plans may be difficult for inexperienced teams and misconstrued if the process was not guided properly (Stewart et al., 2020). Comprehensive succession plans helped organizations identify talent within their existing leadership pipeline (Heneman et al., 2019). Theme Four: Documentation of Standardized Processes explained that the directions provided to the team helped them complete the process for leadership transitions with ease. Ballaro and Polk (2017) found that organizations failed to implement succession planning efforts when they misunderstood the purpose of the activity. Findings from this study revealed that for leadership transitions to be successful, the team had to perform the required steps in a specific order. Having an instruction manual to guide the team ensured they clearly

understood the expectations of their organization. Moreover, establishing policies and procedures assisted the team with pinpointing qualified successors that could step into the leadership role once the transition occurred.

Last, this study may assist organizations with tailoring succession plans to fit their business model. Theme five: Staying Mission-focused entailed the behaviors and actions facilitators used to help the team focus on their organization's mission, while establishing a plan for leadership continuity. Worth (2019) explained without leadership continuity, non-profit organizations would not be able to fulfill its mission. The findings from this study revealed the team was responsible for actively creating a pool of potential successors to take on future executive leadership roles. Decision makers' placed a strong emphasis on finding successors who shared the same religious faith, which guided the principles of the organization. Collectively, the team formulated a strategy to implement executive leadership appointments that accompanied their organization's business model. Incorporating succession plans for executive leadership positions ensured that Ohio's faith-based organizations achieved their goal of implementing smooth leadership transitions within a reasonable timeframe. Through a strategic planning process, succession plans for executive leadership positions were designed to recruit and identify qualified leaders for upcoming vacant positions, which revealed how decision makers' prepared for changes within the organization. Setting clear goals and making detailed plans for the appointment and replacement of leaders contributed to a successful implementation of succession planning efforts for executive leadership positions within Ohio's faith-based organizations.

Potential Application Strategies

Five potential application strategies were identified based on the findings from this study. The recommendations proposed may help improve succession planning efforts for executive leadership positions within faith-based organizations. The recommendations provided were based on the study participants' experience and their understanding of the executive leadership selection and succession planning processes within their faith-based organization. Moreover, incorporating the following practices may lead to a potential successful outcome for succession planning efforts.

The first recommendation was organizations should give community volunteers and paid staff the opportunity to take on a leadership role. The findings from the study revealed that individuals holding non-managerial positions often misunderstood the purpose and functions of the leadership teams and were unaware of the events that were happening within the organization. The benefit of including everyone was it provided the organization with the opportunity to source talent from their internal network. Norris-Tirrell et al. (2020) discovered that sourcing talent from internal networks was an asset for non-profit organizations that sought to establish meaningful relationships with passive candidates and expand their leadership pool.

The second recommendation was organizations should ensure that each team member understands their roles and responsibilities regarding the scope of work to be performed. Several academic scholars informed there was contention amongst the groups of individuals involved in the succession planning process when their roles and responsibilities were undefined (Barton, 2019; Kuenzi & Stewart, 2017; Stewart, 2016; Stewart et al., 2020). The findings from this study demonstrated that to avoid stress and confusion, everyone needed to understand which part of the work they were assigned. At Ohio's faith-based organizations, succession planning projects were

designed and organized for different groups of individuals to make the process more manageable. These findings indicated when teams focused on a specific area, it made them more committed to completing the project.

The third recommendation was organizations should create an inclusive environment that allowed everyone the ability to freely express their opinions and recommend changes. Stewart et al. (2020) emphasized that corrective action was necessary when feedback was not obtained prior to making changes. The findings from this study expressed team members felt their input was more valuable when they addressed the strengths and weaknesses identified in the succession planning process. At Ohio's faith-based organizations, the team was more committed to completing the required tasks when they treated each other with respect and discussed the matters together.

The fourth recommendation was organizations should establish well-defined policies and procedures to prepare others for succession planning where everyone at the organizations has access to it. Santora et al. (2019) stated organizational policies set in place for succession planning efforts leads to smooth leadership transitions. The findings from this study revealed that establishing written policies and procedures for leadership transitions ensured that the work performed was designed for its intended purpose. At Ohio's faith-based organizations, the team needed guidance and structure to successfully execute the tasks required for leadership transitions. Without the proper guidance, teams were unable to navigate the task during each phase and were unfamiliar with how the process worked.

Last, the fifth recommendation was stakeholders should be trained and educated about the importance of their role within the succession planning process. Ballaro and Polk (2018) found when groups of individuals were unfamiliar with their roles within the succession planning

process, the organization was unable to achieve its goals. The findings from this study indicated that teams working on the succession planning project gave them a sense of purpose and connection to the organization. As the groups of individuals familiarized themselves with their role, they took more interest in their work, and built more confidence as they navigated through the process.

Summary of Application to Professional Practice

The findings from this study determine the strategies organizational decision makers may use to reduce the gaps within their leadership pipeline. Succession planning for executive leadership positions may be difficult for small non-profit organizations without the adequate resources (Stewart, 2017). The previous sub-sections discussed how these findings may improve the general business practices and provided potential application strategies for the non-profit sector. Five suggestions were discovered from the findings that may help organizational decision makers with improving the executive leadership selection and succession planning processes at their non-profit.

Recommendations for Further Study

Three areas were recommended for further study on the topic of succession planning for non-profit organizations. First, this study revealed the factors used by faith-based organizations to select executive leaders. Future researchers could embark on the succession planning efforts of faith-based organizations and their strategy to recruit young professionals (i.e., high school age) for leadership positions. Findings from the study revealed more students were needed to take on leadership roles. Further, the academic literature implied that graduate students were being recruited for non-profit leadership positions, yet there has been limited studies conducted on young professionals entering the workforce (Nelson, 2018). Therefore, researching leadership

positions from the perspective of young professionals may provide additional insights for organizations seeking to expand its leadership development opportunities.

Second, this study revealed the factors that contributed to the potential successful or failure to implement succession planning efforts for executive leadership positions within Ohio's faith-based organizations. While the findings from this study focused on the state of Ohio, another possibility for future research on the topic of succession planning for executive leadership positions within faith-based organizations in other states. The findings from this study indicated there were plans to expand the leadership pool of candidates outside of the state of Ohio. Expanding the topic of succession planning for executive leadership positions to other areas of the United States may produce different results.

Third, this study was limited to non-profit organizations that were organized as a faith-based organization. This qualitative multiple-case study raised important questions about the executive leadership selection and succession planning efforts within faith-based organizations. Therefore, future research was encouraged for succession planning efforts within other genres of the non-profit sector. Assessing other genres outside of faith-based organizations may reveal the lessons learned during the successful or failure to implement succession planning efforts.

Reflections

The following subsections discuss the personal and professional growth and Biblical perspective of the study. The personal and professional growth section highlights the lessons learned throughout the study. Using a Biblical perspective, the findings of the study is used to highlight the importance of preparing for leadership continuity. Two examples from the scriptures served as distinguishing factors between the success or failure to plan for leadership continuity.

Personal & Professional Growth

This researcher sought to better understand the process used to select executive leaders within faith-based organizations. Personally, this study has helped the researcher utilize interpersonal communication skills when interacting with participants. For instance, during the participant interviews the researcher had to listen attentively without interrupting, which helped to learn more about the participant's experiences and their perspective of the problem within their workplace. Moreover, the study allowed the researcher to meet and learn from individuals within a different professional network. Meeting these professionals educated the researcher with new ideas and concepts that may potentially work for non-profit genres. For instance, working in teams and sharing knowledge reiterated the importance of addressing potential future problems that may occur within the workplace.

The participant interview transcripts allowed the researcher to reflect on the executive leadership and succession planning processes the faith-based organization had been using for more than 20 years. The researcher was surprised to learn Ohio's faith-based organizations used job rotations for the continuity of leaders. When the researcher first conducted the study, the initial thought was executives spent the majority of their career at one place until they retired or resigned. The reason was because non-profit organizations illustrated in the academic literature revealed executive leaders hardly ever left their position. Moreover, the concept of rotating leaders was an eye-opening experience because it made sense for the organization. The literature depicted leaders relocated to different organizations with similar missions to move up the career ladder; however, Ohio's faith-based organizations revealed a similar strategy that allowed executives to transfer internally.

Professionally, this study taught the researcher that conducting succession planning activities at a non-profit organization required a team effort. Although conflicts in the workplace arose, it was best for teams to maintain an open-minded approach and be receptive to new ideas, even if the person did not necessarily agree. The researcher recounted Hersey and Blanchard's (1993) situational leadership theory that theorized no leadership style was better than the other. Nevertheless, the concept of rotating leaders was not new to the participants, and they admitted there were mistakes made within the processes. Practically, there would always be room for more improvement when incorporating changes that involved the executive leadership selection and succession planning processes.

Biblical Perspective

This qualitative multiple-case study explored the potential lack of succession planning, resulting in the inability to identify future leaders. The findings in this study gave examples of the successful and failure to implement succession planning efforts for executive leadership positions. Worth (2019) stated eventually staff members and key volunteers holding leadership positions would eventually need to be replaced and there may not always be an advanced warning. The Old and the New Testament provided guidance with preparing for leadership succession, and the consequences of when leaders failed to prepare for a successor. In the Old Testament, Joshua was appointed as the new leader to take over Israel after Moses died, and the leadership transition went smoothly (Joshua 1:1-9). However, when Joshua died, he did not appoint a successor, so the Lord appointed judges as temporary leaders for the people of Israel (Judges 2:16; Acts 13:17). As a result, the people would not listen to the judges and were disobedient to God and experienced hard times (Judges 2:17-19). The people of Israel did not have an adequate leader for 450 years. Then God appointed Samuel, a prophet, to be the next

leader (Acts 13:20). The findings of the study revealed that faith-based organizations strived to have an uninterrupted leadership pipeline by implementing job rotations for qualified leaders. After the previous executive moved on, the work at the organization had to be continued.

Nevertheless, these findings hold that rotating leaders to establish leadership continuity was not a newly designed concept. Hence, non-profit executives have been switching to other non-profit organizations since the beginning of their career. According to Norris-Tirrell et al. (2018) non-profit executives spent most of their career in the sector, switched to other non-profit organizations with similar missions, and relocated to advance their career. Moreover, the findings from this study revealed that decision makers' believed that leaders were sent to different locations so they could use their God given talents and gifts.

The scriptures in the New Testament taught that leadership appointments are temporary, and that the leader would eventually have to move on. For example, the Apostle Paul traveled to different cities preaching the gospel and using his skills as a tent maker (Acts 13:4, Acts 18:1). When Apostle Paul traveled to Corinth, he became friends with Aquila and Priscilla who were also tentmakers and had a passion for Christ (Acts 18:1-4). Apostle Paul stayed in Corinth for a year and a half teaching the word of God to the people (Acts 18:11). When it was time for Paul to depart Corinth, Aquila and Priscilla asked him if he could stay longer. Unfortunately, Paul declined the offer and promised that if it was in God's will, he would see them again one day (Acts 18:18-22).

The findings of this study highlighted the importance of assigning roles and responsibilities and documenting the steps taken for others to follow. Further the findings emphasized that prayer helped create unity and momentum, as the group focused on working on the succession planning project. Hersey and Blanchard (1993) implied that situational leadership

required leaders to provide instructions to their followers and ensured they had the knowledge, skills, and ability to successfully execute the tasks. The academic literature attested that when non-profits miscommunicated and failed to provide instructions, the groups of individuals failed to implement succession planning efforts for executive leadership positions (Hunter & Decker-Pierce, 2021; Stewart & Twumasi, 2020; Varhegyi & Jepsen, 2017; Vito, 2018).

The scriptures connected the roles and responsibilities of leaders that were used for building God's kingdom. Paul identified his role and responsibilities as a servant of Christ Jesus who was called to be an apostle and set apart the gospel of God (Romans 1:1). While in prison, Apostle Paul wrote epistles addressing the problems of the church, gave instructions about the roles and responsibilities of church leaders, and the reason behind his instructions (1 Corinthians 1:10; 1 Timothy 3:1-16). Moreover, he attempted to unify believers in the community despite their differences (Romans 1:11-24; 1 Corinthians 12-31).

Summary of Reflections

Succession planning for executive leadership positions were presumed to be effective tools used by Ohio's faith-based organizations. This study explored the factors by which non-profit organizations selected candidates for executive leadership positions and the successful or failure to implement succession planning efforts. The reflections described the personal and professional growth and Biblical perspective, which highlighted the lessons learned from this study. Together, these findings contributed to the body of knowledge and understanding of the non-profit sector and its commitment to understanding the topic of succession planning for non-profit executive leadership positions.

Summary of Section 3

Section 3 focused on the application to professional practice and implications for change. This qualitative multiple-case study consisted of data collected from semi-structured interviews, documents, and archival records. The sample included 18 senior leaders from faith-based organizations located in the eastern and western regions of Ohio. To present the findings for this study, the researcher used Creswell and Poth's (2018) five steps for qualitative research. Microsoft Word, Excel, and NVivo was used to organize and perform data analysis. As a result, five themes were identified as part of this study, which included (a) the importance of rotating leadership, (b) defined role and responsibilities, (c) creating unity amongst the group, (d) documentation of standardized processes, and (e) staying mission-focused. The five themes supported the guiding research questions that were designed for this study. Further, three recommendations were presented for future studies on the topic of succession planning for executive leadership positions within the non-profit sector. The reflections revealed the researcher's commentary from a Christian worldview perspective. The researcher discussed the findings as they related to teachings presented in the new and Old Testament of the Bible. Section 3 concludes with discussions centering on the summary and study conclusions for this study.

Summary and Study Conclusions

The general problem addressed was the potential lack of succession planning, resulting in the inability to identify future leaders. The specific problem addressed was the potential lack of succession planning, resulting in the inability to identify future leaders within Ohio's faith-based organizations. The findings from this study gave new insights on the factors by which faith-based organization selected executive leaders, and succession planning efforts that contributed to the successful or failure of implementation. Hershey and Blanchard's (1993) situational leadership theory helped to better understand the actions and behaviors used by the group facilitator. The researcher's findings revealed it was necessary for the facilitator to use different leadership styles to keep the team motivated during succession planning activities.

Subsequently, the results of this study and recommendations contributed to the body of knowledge of succession planning within the non-profit sector. The topic of succession planning for executive leadership positions may help organizations identify future leaders. The responses described the strategies decision makers used to fill the gaps within the existing leadership pipeline that may be applicable for the non-profit sector at-large. This study affirmed the responses added value by highlighting some of the common issues and challenges found within the executive leadership and succession planning processes. For instance, the responses indicated misunderstanding the scope of work contributed to a failure to implement succession planning efforts.

Moreover, the responses revealed new directions that may extend the topic of succession planning for executive leadership positions. First, future researchers were encouraged to embark on the succession planning efforts of faith-based organizations and their strategy to recruit young professionals (i.e., high school age) for leadership positions. Second, future researchers were

directed to conduct research on the topic of succession planning for executive leadership positions within faith-based organizations in other states. Third, future researchers were suggested to expand the topic of succession planning efforts within other genres of the non-profit sector.

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Appendix A: Screening Survey

<i>Screening Survey</i>	
Directions: For each question, please select the applicable answer.	
Question	Answer
1. Have you ever held employment or volunteered for an Ohio faith-based organization?	<input type="checkbox"/> Yes <input type="checkbox"/> No
2. Have you ever participated in a search committee to replace a leader at a faith-based organization?	<input type="checkbox"/> Yes <input type="checkbox"/> No
3. Are you currently serving as a volunteer or receiving compensation?	<input type="checkbox"/> Yes <input type="checkbox"/> No
4. Have you ever held a leadership role within an Ohio faith-based organization? <i>Example of leadership roles (not all inclusive): Board Member, Executive Director, CEO, Manager, Clergy Member, District President, Counselor, Staff Parish Relations Committee Member</i>	<input type="checkbox"/> Yes <input type="checkbox"/> No
5. What is your gender?	<input type="checkbox"/> Male <input type="checkbox"/> Female
6. What is your age?	<input type="checkbox"/> 18 – 34 <input type="checkbox"/> 35 – 50 <input type="checkbox"/> 51 – 69 <input type="checkbox"/> 70 – 87 <input type="checkbox"/> 88 or over
7. How long have you been employed or volunteered with this organization?	<input type="checkbox"/> < 1 year <input type="checkbox"/> 1-2 years <input type="checkbox"/> 3-5 years <input type="checkbox"/> 6-10 years <input type="checkbox"/> 10+ years
8. How long did/have you served in this role at the faith-based organization?	<input type="checkbox"/> < 1 year <input type="checkbox"/> 1-2 years <input type="checkbox"/> 3-5 years <input type="checkbox"/> 6-10 years <input type="checkbox"/> 10+ years
9. What is the highest degree or level of school you completed? If currently enrolled in school, please state the highest degree received.	<input type="checkbox"/> High school diploma or equivalent <input type="checkbox"/> Associates degree or Trade school <input type="checkbox"/> Bachelor's degree <input type="checkbox"/> Master's degree <input type="checkbox"/> Professional or doctorate degree <input type="checkbox"/> Other (Please state) Click or tap here to enter text.

Appendix B: Interview Guide

The interview guide is separated into three parts to help address the study's three research questions. The three research questions are:

RQ1. What factors are used by faith-based organizations to select executive leaders?

RQ2. What factors contribute to the successful implementation of succession planning efforts at faith-based organizations?

RQ3. What factors contribute to the failure to implement succession planning efforts for executive leadership positions at faith-based organizations?

The researcher has included two warm-up questions that will help establish rapport with the participant. Part one of the interview guide focuses on questions relating to selecting executive leadership positions within faith-based organizations. Parts two and three of the interview guide focuses on the participant's experience with the facilitator during the succession planning process.

Warm-up Questions

Thank you for agreeing to meet with me today. Did you have any questions about the study before we begin?

1. How did you become involved as a volunteer or staff member of the faith-based organization?
2. When asked to participate in the search committee to replace a leader at our faith-based organization, what were your initial impressions?

Main Interview Questions: Part One

1. How does your organization recruit and identify candidates for executive leadership positions? [RQ. 1]
2. What requirements do candidates need to meet to qualify for executive leadership positions? [RQ. 1]
3. How does your organization help candidates qualify for executive leadership positions? [RQ. 1]

Main Interview Questions: Part Two

1. Briefly describe the succession planning process at your organization. [RQ. 2, RQ. 3]
2. Based on your experience, describe the interaction between the facilitator and the group during the succession planning activity. [RQ. 2, RQ. 3]
 - a. How did the facilitator and group members make decisions regarding the succession planning activity? (probe)
 - b. How did the facilitator provide directions to group members during the succession planning activity? (probe)
3. Describe any positive interactions between the facilitator and group during the succession planning activity. [RQ. 2]
 - a. How did the facilitator create a positive experience with the group? (probe)

Part Three:

1. Describe any challenges the group experienced during the succession planning activity. [RQ. 3]
 - a. How did the facilitator help the group to overcome those challenges? (probe)
 - b. In what ways could the facilitator have increased the support provided to the group? (probe)
2. In your opinion, is there any part of the succession planning process that you could change at your organization? If so, what would it be?
3. Do you have additional information that you would like to provide for this study?

Appendix C: Participant Consent Form

Consent

Title of the Project: Exploring Succession Planning for Executive Leadership Positions within Ohio's Faith-Based Organizations: A Multiple-Case Study

Principal Investigator: Gilda Drammeh, D.B.A. Candidate, Liberty University

Invitation to be Part of a Research Study

You are invited to participate in a research study. To participate, you must be 18 years of age or over, be a current or former volunteer or employee for an Ohio faith-based organization, have had a leadership role at the organization, and have participated in a search committee to appoint a new leader. Taking part in this research project is voluntary.

Please take time to read this entire form and ask questions before deciding whether to take part in this research.

What is the study about and why is it being done?

The purpose of the study is to understand the executive leadership selection and succession planning processes from the perspective of former and current volunteers and employees affiliated with an Ohio faith-based organization. The findings from this study may inform or improve the process, procedures, policies, and theories related to executive leadership selection and succession planning within the non-profit sector.

What will happen if you take part in this study?

If you agree to be in this study, I will ask you to do the following things:

1. To participate in an individual online interview via Microsoft Team. Additionally, you will be asked to be video, and audio recorded. The estimated time for this effort is 30 to 45 minutes.
2. To email supporting documents (i.e., job descriptions, policies, annual reports, meeting notes) that are related to the appointment of an executive leader and succession planning. The estimated time for this effort is 30 minutes.
3. To follow-up with me in a brief conversation to confirm the accuracy of your interview transcript. The estimated time for this effort is 15 minutes.

How could you or others benefit from this study?

Participants should not expect to receive a direct benefit from taking part in this study. Benefits to society include adding to the body of knowledge of non-profit educational research, as it pertains to the recruitment and selection of executive leaders with faith-based organizations.

What risks might you experience from being in this study?

The risks involved in this study are minimal, which means they are equal to the risks you would encounter in everyday life.

How will personal information be protected?

The records of this study will be kept private. Published reports will not include any information that will make it possible to identify a subject. Research records will be stored securely, and only the researcher will have access to the records. Data collected from you may be shared for use in future research studies or with other researchers. If data collected from you is shared, any information that could identify you, if applicable, will be removed before the data is shared.

- Participant responses will be kept confidential through the use of codes. Interviews will be conducted in a location where others will not easily overhear the conversation.
- Data will be stored on a password-locked computer and may be used in future presentations. After three years, all electronic records will be deleted.
- Interviews will be audio and video recorded and transcribed. Recordings will be stored on a password locked computer for three years and then erased. Only the researcher will have access to these recordings.

How will you be compensated for being part of the study?

Participants will not be compensated for participating in this study.

Is study participation voluntary?

Participation in this study is voluntary. Your decision whether or not to participate will not affect your current or future relations with Liberty University or the cooperating institutions. If you decide to participate, you are free to not answer any question or withdraw at any time without affecting those relationships.

What should you do if you decide to withdraw from the study?

If you choose to withdraw from the study, please contact the researcher at the email address/phone number included in the next paragraph. Should you choose to withdraw, data collected from you will be destroyed immediately and will not be included in this study.

Whom do you contact if you have questions or concerns about the study?

The researcher conducting this study is Gilda Drammeh. You may ask any questions you have now. If you have questions later, **you are encouraged** to contact her at xxx-xxx-xxxx and/or xxx. You may also contact the researcher's faculty sponsor, Dr. Jimmy Duncan, at xxx.

Whom do you contact if you have questions about your rights as a research participant?

If you have any questions or concerns regarding this study and would like to talk to someone other than the researcher, **you are encouraged** to contact the Institutional Review Board, 1971 University Blvd., Green Hall Ste. 2845, Lynchburg, VA 24515 or email at irb@liberty.edu.

Disclaimer: The Institutional Review Board (IRB) is tasked with ensuring that human subjects research will be conducted in an ethical manner as defined and required by federal regulations. The topics covered and viewpoints expressed or alluded to by student and faculty researchers are those of the researchers and do not necessarily reflect the official policies or positions of Liberty University.

Your Consent

By signing this document, you are agreeing to be in this study. Make sure you understand what the study is about before you sign. You will be given a copy of this document for your records. The researcher will keep a copy with the study records. If you have any questions about the study after you sign this document, you can contact the researcher using the information provided above.

I have read and understood the above information. I have asked questions and have received answers. I consent to participate in the study.

The researcher has my permission to audio and video-record me as part of my participation in this study.

Printed Subject Name

Signature & Date